

**PD² Versions
4.1x and 4.2**

*Functional
Differences*

v4.1x versus v4.2

- Looks the same, feels the same, but.....

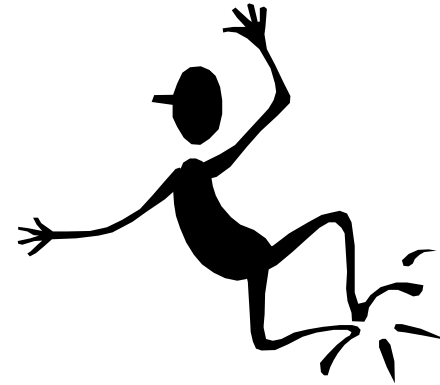
Much Easier!

Much Faster!

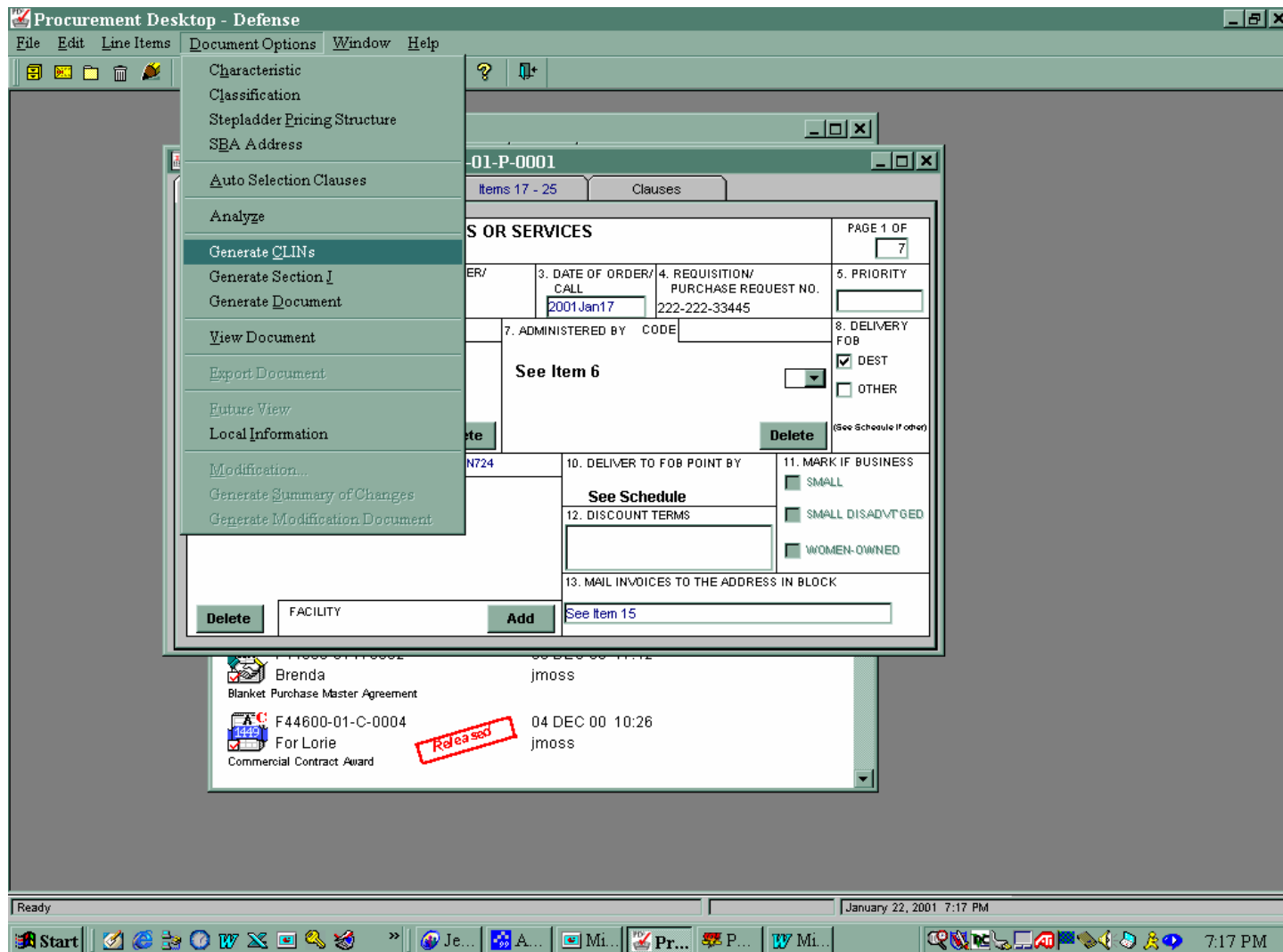
More Functionality!

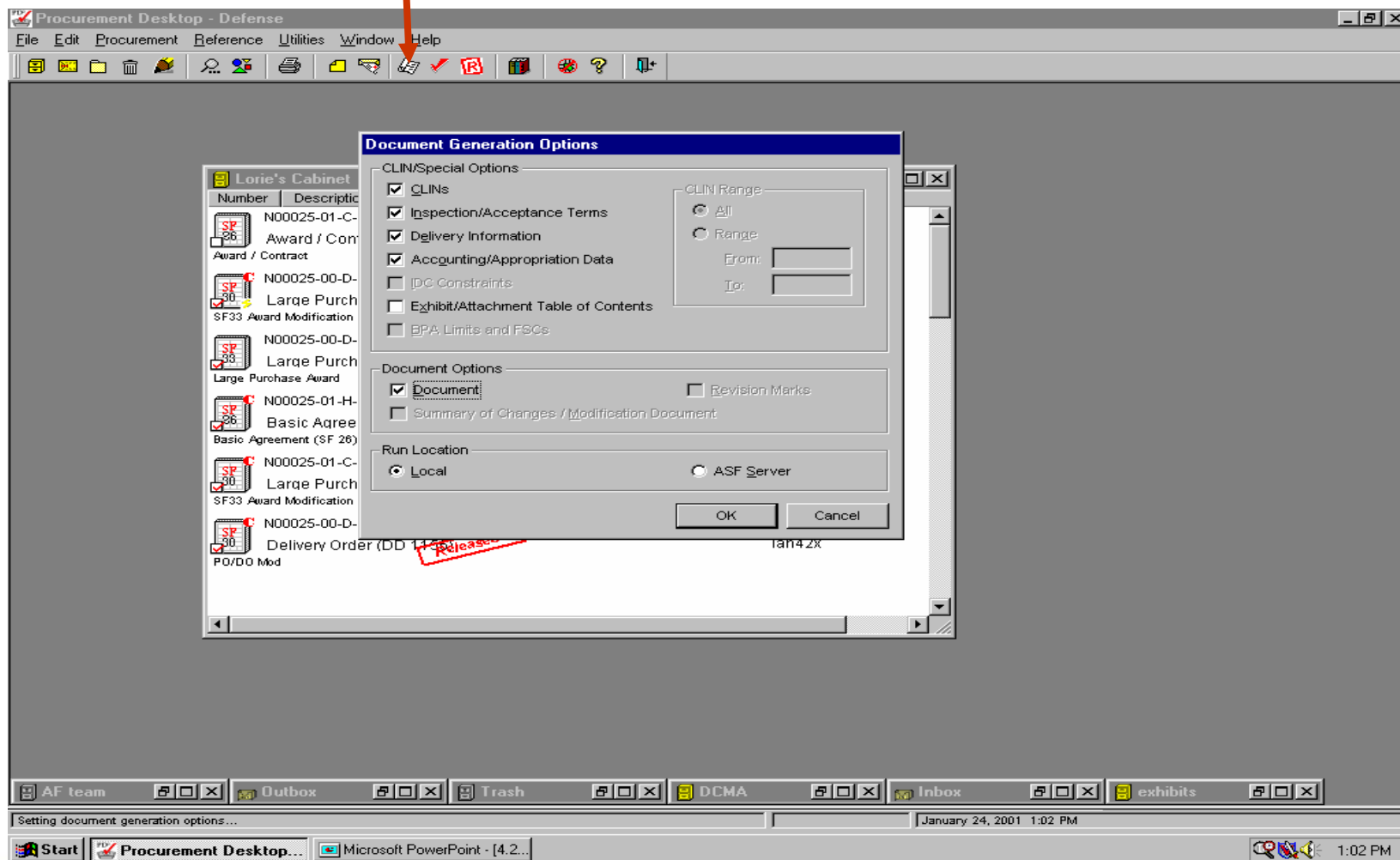
IT'S A WINNER!!!!





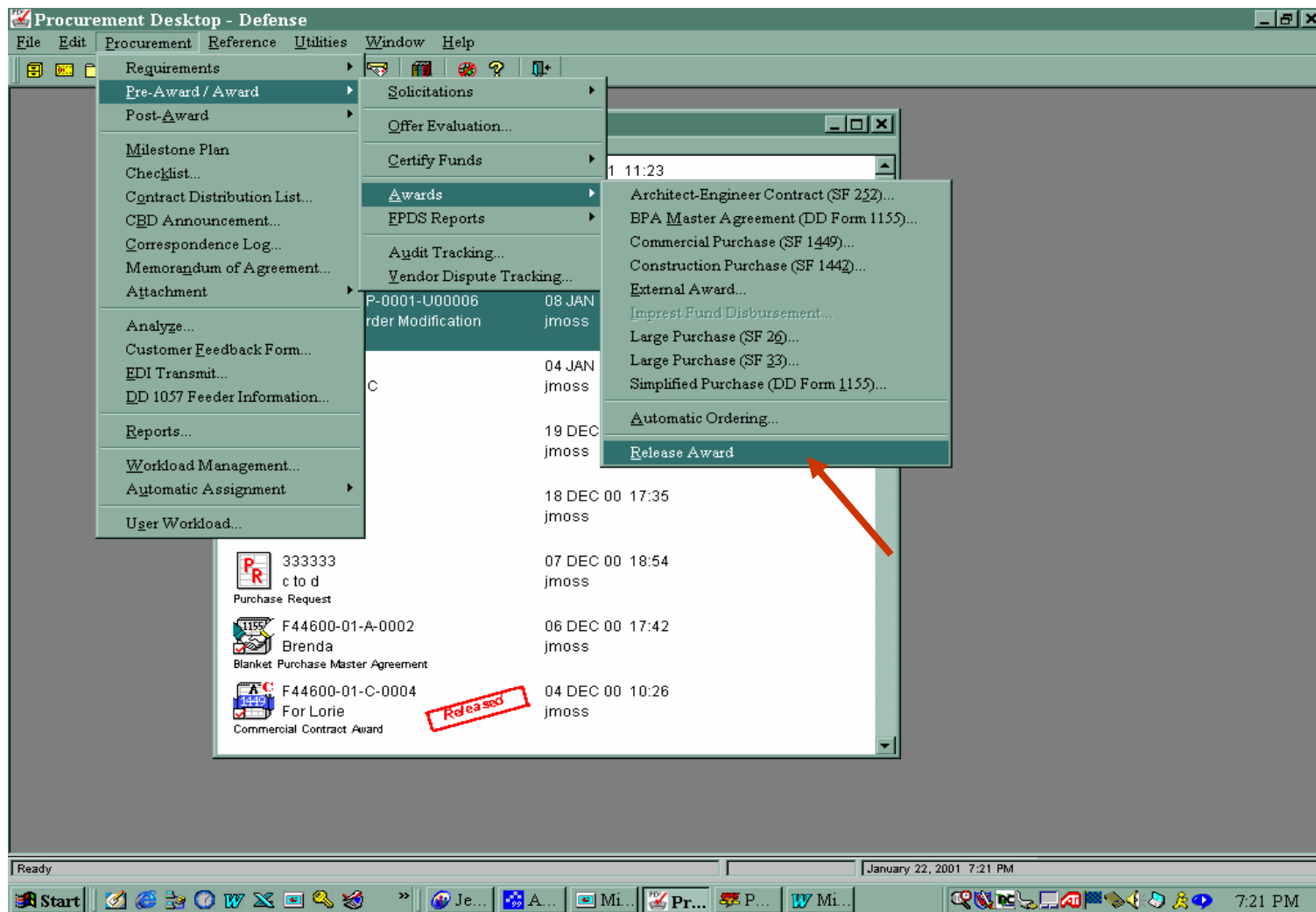
- **Generate Icon**
- Generate in one stroke
- PR & PR Mods are generated. This allows PR Mod changes to be “validated,” and PR/PR Mod text documents (attachments and clauses) to be captured.
- Save and Close; Highlight the document and click on **Generate** (menu or toolbar). Applicable blocks are already checked the first time. If you re-generate, you must re-check the appropriate blocks.

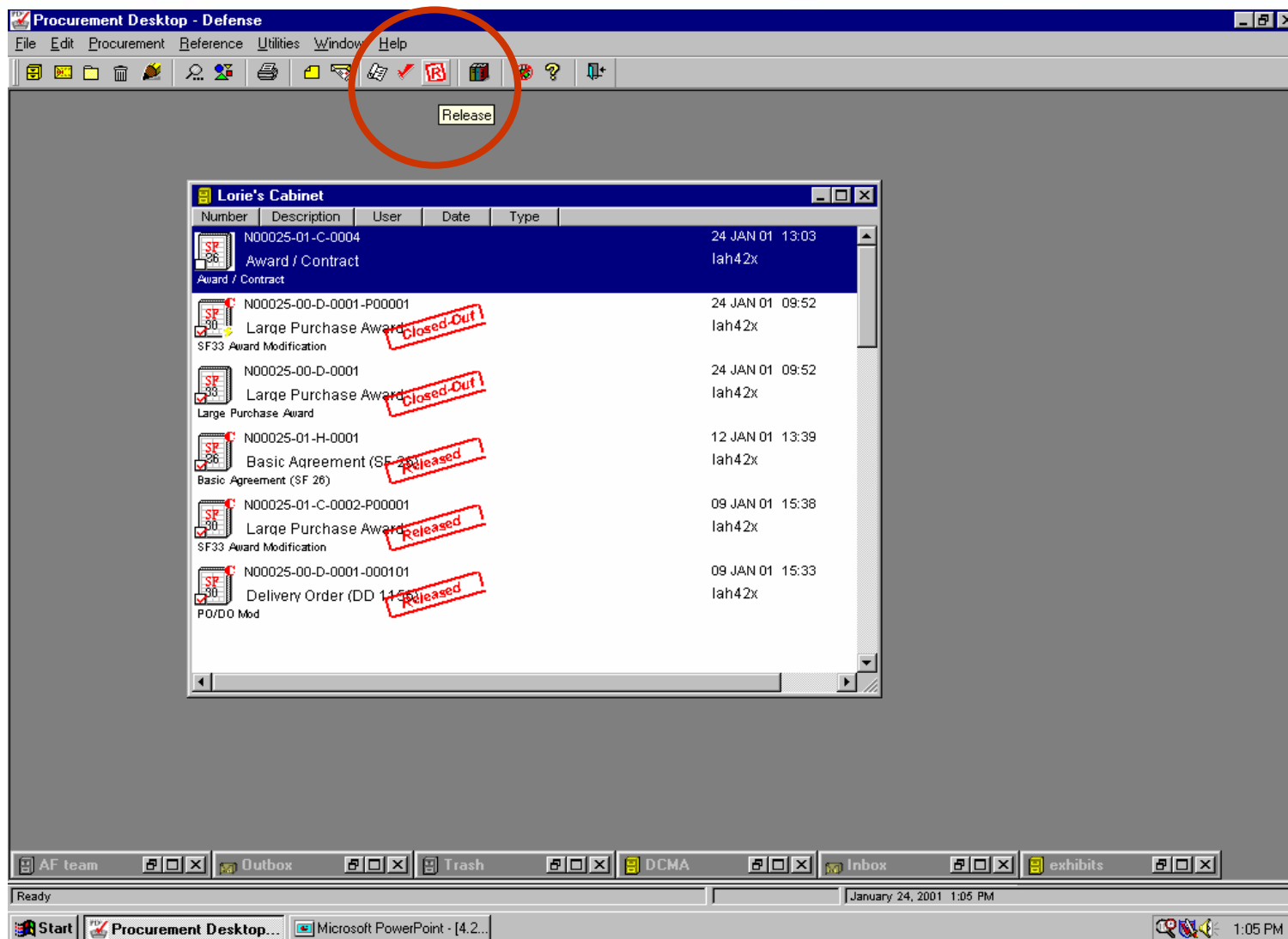


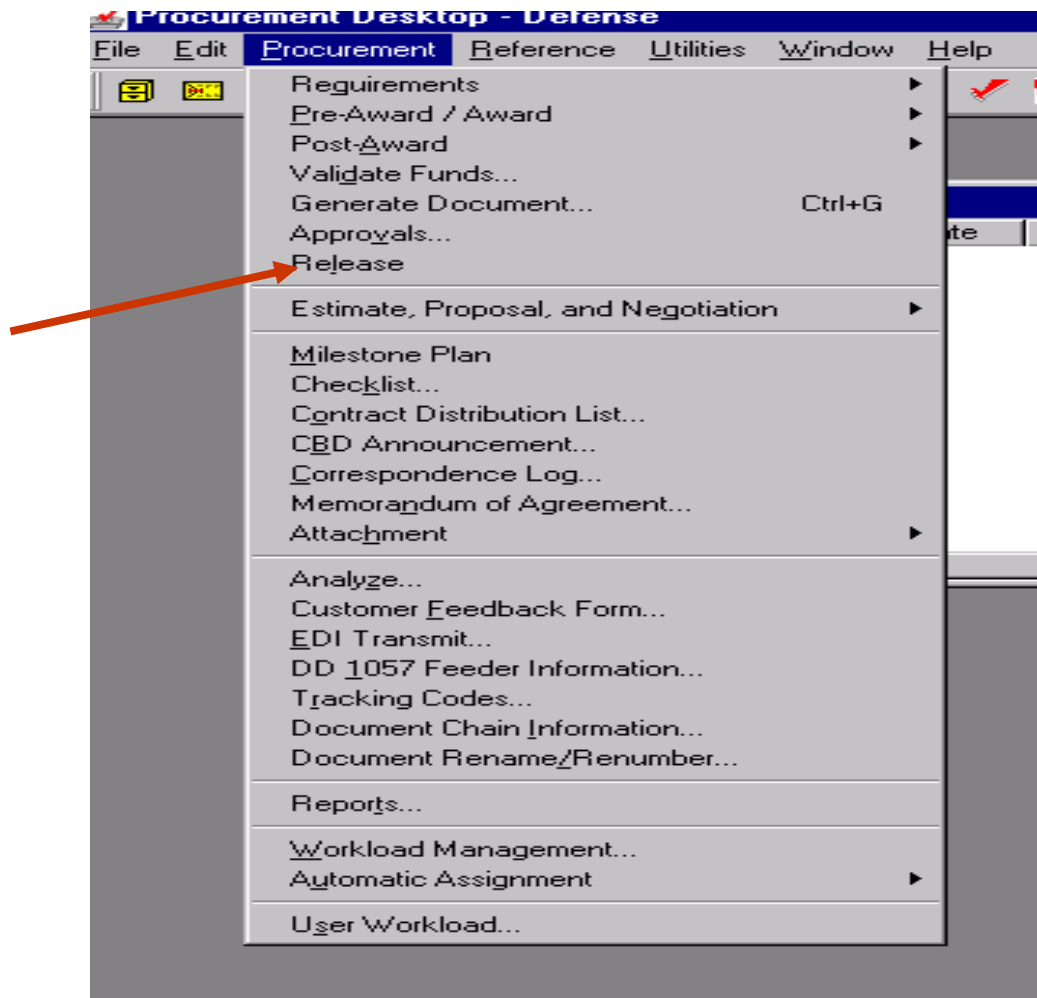
GENERATE
DOCUMENT

- **Release** Icon
- Option under **Procurement**
- Same button for all Released Documents
- PRs mods are still released and PRs are not









- Additional data fields (**Project Number, Planned Execution Method, Date, Date Proposal Due, Classification Subtypes-Code and Description**).
- *Clauses* tab added; Clauses are associated to CLINs
- Other line item enhancements included in solicitations and awards documents, i.e. **NSN data** available for selection; **Delivery for Multiple** dates, sites, etc.; Long Line of Accounting accommodated.
- **Requirements Status** window to trace document pricing and award status.
- **Funding Status** window to trace committed versus obligated funds.

PR Mod Functionality in v4.2

- Currently in v4.1x, to modify a line item, you create a PR Mod, approve and release. You delete the applicable line item(s) in the line item summary of the contract award document and attach the PR Mod from line items on the toolbar, which pulls in the revised CLIN(s); You will not be able to do that in v4.2. As in the “real world,” you never delete a contract line item after award; you terminate or cancel. You will make the changes in the SF 30 and conformed copy of the award. Since the PR is now generated, the new information is recorded in the system. The preapproval check will validate that the funds/CLINs were changed in the system for the PR Mod.

PR/PR MOD

Clauses Tab Added in v4.2

The screenshot displays the 'Procurement Desktop - Defense' application window. The main form is titled 'PR Mod - NEW REQN-0001'. It features a tabbed interface with the following tabs: 'Main Form', 'Line Items', 'Contracts', 'Add'l Data', and 'Clauses'. The 'Clauses' tab is highlighted with an orange arrow and labeled 'Note Clauses Tab'. The 'Main Form' tab is currently active, showing a 'Purchase Request' form. The form includes fields for 'Description' (PR Mod), 'Purchase Request Number' (NEW REQN-0001), 'Requestion Date' (28-Mar-2001), 'DPAS Priority Rating' (DOC9e), and 'Priority' (12). It also has a 'Requesting Office' field (1 CONS/CC) and a 'Type of Action' section with radio buttons for 'Small Purchase', 'Competed Contract', 'Non-competed Contract', 'Manufacturer Sole Source', 'Delivery Order', 'Task Order', 'Grants/Coops Agreement', 'Sealed bid', 'FSS/GSA Schedule', 'Commercial', and 'NIB / NISH / FPI'. There are 'Details...' and 'Delete' buttons for the 'Requesting Office' and 'Issuing Office' (NAVAL FACILITIES ENGINEERING COMMAND). The 'Supply Source' field is empty, and the 'Suggested Vendor(s)' field has a 'Details...' and 'Add' button. The 'Ship To' field is empty, and the 'Comments' field is empty. The status bar at the bottom shows 'Ready', 'March 28, 2001 11:14 AM', and the taskbar with 'Start', 'Lorie Higgins - Inbox - Lotu...', 'Microsoft PowerPoint - [diff...]', and 'Procurement Desktop...'.

The Contracting Officer is still responsible for incorporating appropriate clauses in solicitations and contracts. This allows the requiring activity to address specific clauses applicable to it's needs and be incorporated in contract documents.

Additional Data Fields in v4.2

PR Mod - NEW REQN-0001

Main Form | Line Items | Contracts | **Add'l Data** | Clauses

Additional Data	Description PR Mod	Purchase Request Number NEW REQN-0001	
	Requisition Date 28-Mar-2001	DPAS Priority Rating DOC9e	Priority 12
Additional Point of Contact (POC) Information		Security Clearance Required <input checked="" type="radio"/> Unclassified <input type="radio"/> Secret <input type="radio"/> Confidential <input type="radio"/> Top Secret	
		J/A Number []	
[Details...] [Add]		Project Number: [] [Add]	
Property Officer Information		Planned Execution Method: [] Date: []	
		Date Proposal Due: []	
[Details...] [Add]		Classification Subtypes Code Description [] [] [Edit]	

Requirements Status in v4.2

Procurement Desktop - Defense

File Edit **Procurement** Reference Utilities Window Help

Requirements

- Pre-Award / Award
- Post-Award
- Validate Funds...
- Generate Document... Ctrl+G
- Approvals...
- Release
- Estimate, Proposal, and Negotiation
- Milestone Plan
- Checklist...
- Contract Distribution List...
- CBD Announcement...
- Correspondence Log...
- Memorandum of Agreement...
- Attachment
- Analyze...
- Customer Feedback Form...
- EDI Transmit...
- DD 1057 Feeder Information...
- Tracking Codes...
- Document Chain Information...
- Document Rename/Renumber...
- Reports...
- Workload Management...
- Automatic Assignment
- User Workload...

PR Form...

IR Form...

Copy PR/TR...

MIPR (DD Form 448)...

Security (DD Form 254)...

CDRL (DD Form 1423)...

PR Modification...

TR Modification...

Requirement Status

Funding Status

Lorie's Cabinet

Number	Description	User	Date	Type
NEW REQN-0001	PR Mod			
N00025-01-P-0001	Small Purchase Award			
Small Purchase Award				
NEW REQN	Purchase Request			
Purchase Request				

Requirement Status - Purchase Request: NEW REQN

Line Items for Selected Document

Item/Subitem Number	Description:
0001	widgits

Line Item Status Details

Line Item Description: widgits

Currency: US \$

Original Amount: 35,000.00

Award Status: Awd/Defn

Pricing Status: Definitized

Estimated Amount: .00

Proposed Amount: .00

Objective Amount: .00

Negotiated Amount: .00

Mod Linked Document Doc Code Release Date

Selected PR

Funding Status in v4.2

New Folder

Lorie's Cabinet

Number	Description	User	Date	Type
pr/prmods				
N00025-01-P-0008-P00001	PO/DO Mod			
LH-01-0001	PR Mod			

Released

Released

Line Item Funding Status - LH-01-0001

LH-01-0001
PR Mod

Line Item

0001
0002

Display

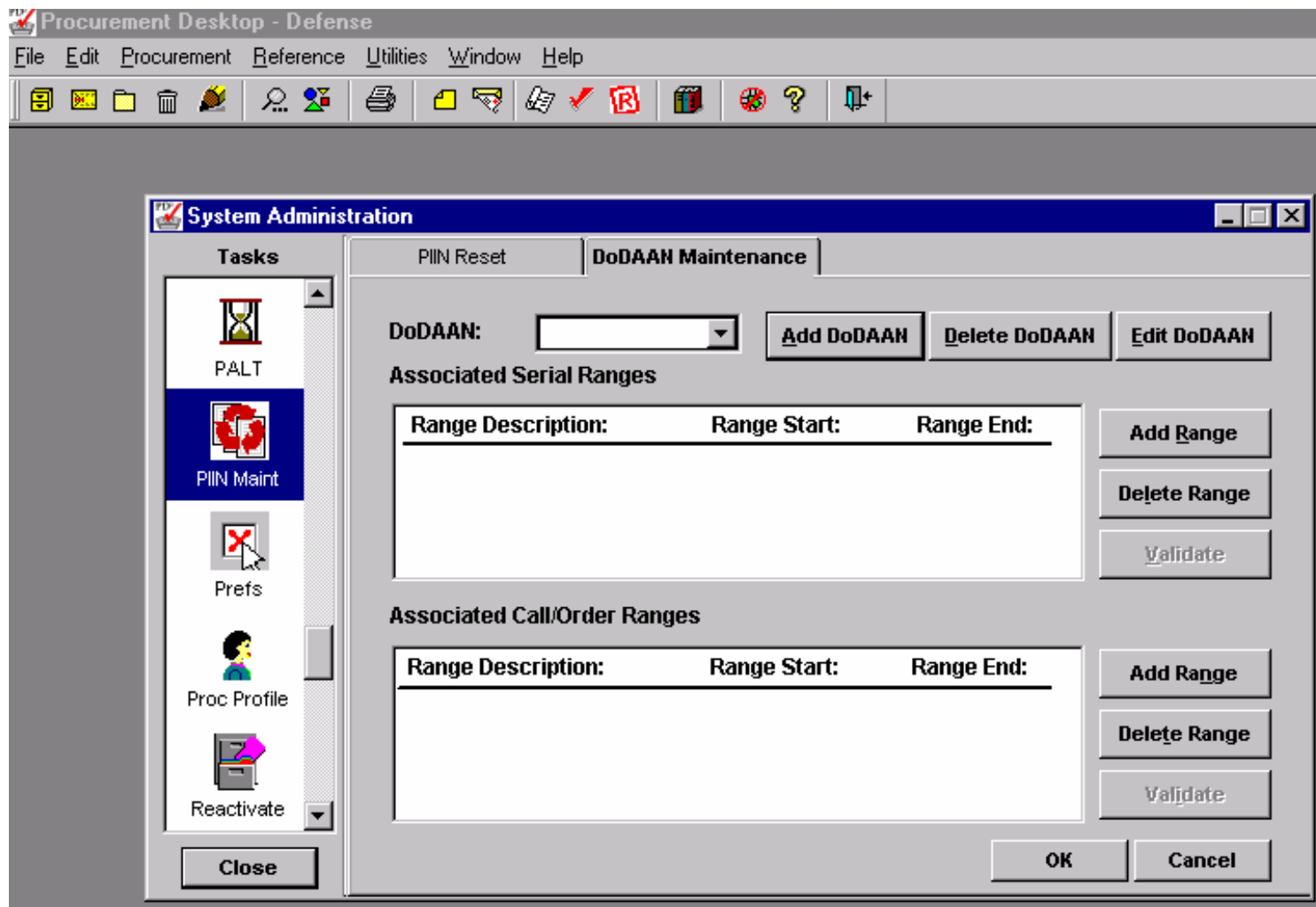
☒ Obligations
☐ Pending Obligations

Committed Amount: \$45,000.00
Obligated Amount: \$45,000.00
Available Amount: \$0.00
Pending Obligated Amount: \$0.00

Contract Number	CLIN	Obligated Amount	Document Owner
N00025-01-P-0008-P00001	0001	\$45,000.00	Lorie A. Higgins

PIIN Enhancements in v4.2

- **PIIN Maintenance** SA task is modified to accommodate the creation of DoDAAN serial ranges.
- The user can select a different DoDAAN and/or serial range over defaults specified in SA.



Change Your Own PIINs

- User can select a different DoDAAN
- Allows the user to change PIIN prior to release; you must unapprove first.
- Also allows for the description to be edited

Select Different DoDAAN in v4.2

Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

UnNamed - 1

Items 1 - 16 Items 17 - 26 Items 27 - 31 Clauses

SOLICITATION/ CONTRACT/ ORDER FOR COMMERCIAL ITEMS

1. REQUISITION NUMBER

2. CONTRACT NUMBER

4. ORDER NUMBER

7. FOR SOLICITATION INFORMATION CALL:

A. NAME

9. ISSUED BY

11. DELIVERY FOR FOB DESTINATION UNLESS BLOCK IS MARKED

SEE SCHEDULE

12. DISCOUNT TERMS

13a. THIS CONTRACT IS A RATED ORDER UNDER DPAS (15 CFR 700)

14. METHOD OF SOLICITATION

15. DELIVER TO CODE

16. ADMINISTERED BY CODE

See Schedule

See Item 9

Details... Add

Create New Commercial Contract Award

☒ Large Purchase ☐ Small Purchase

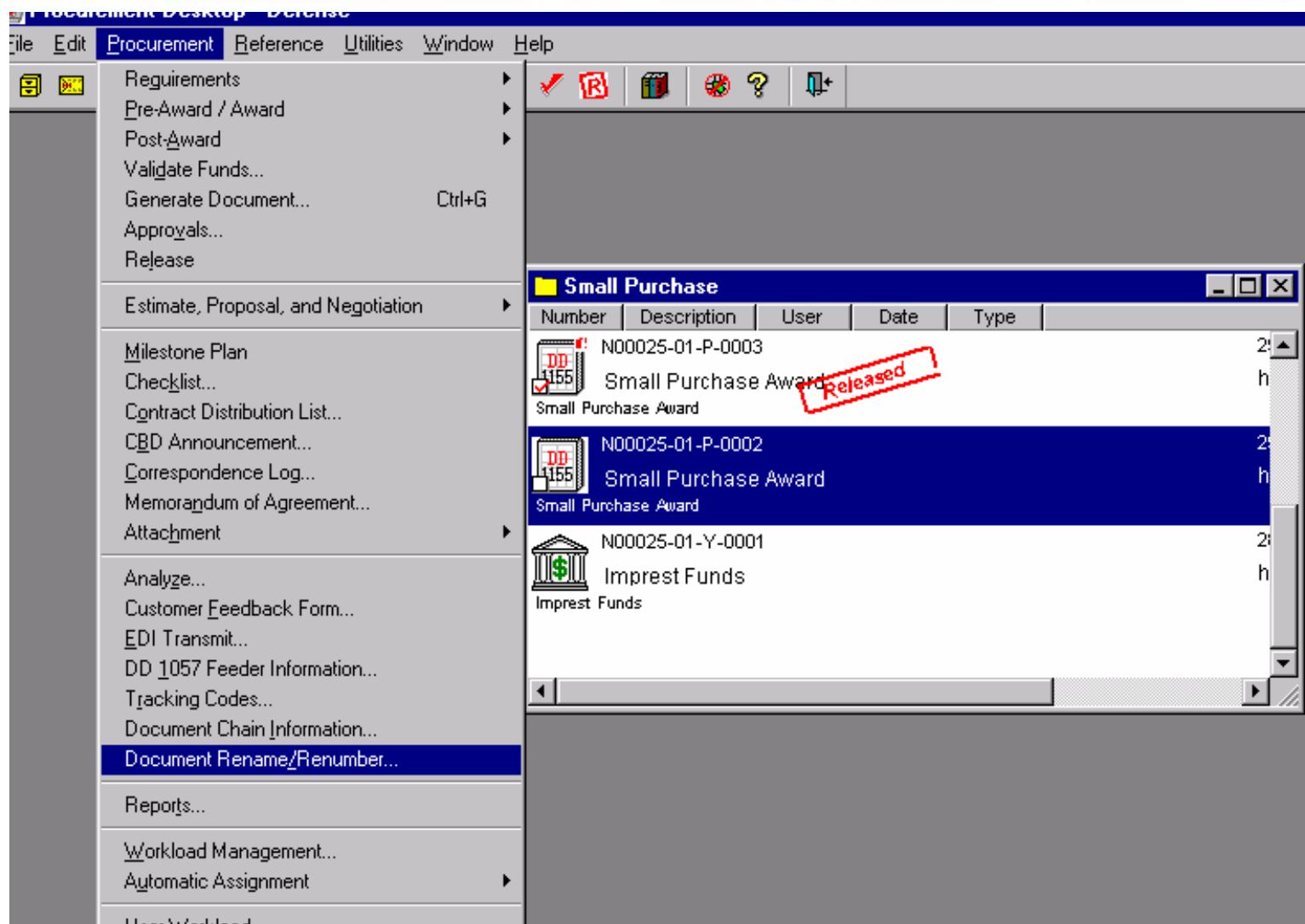
Number: **N00025** - 01 - C - 0001

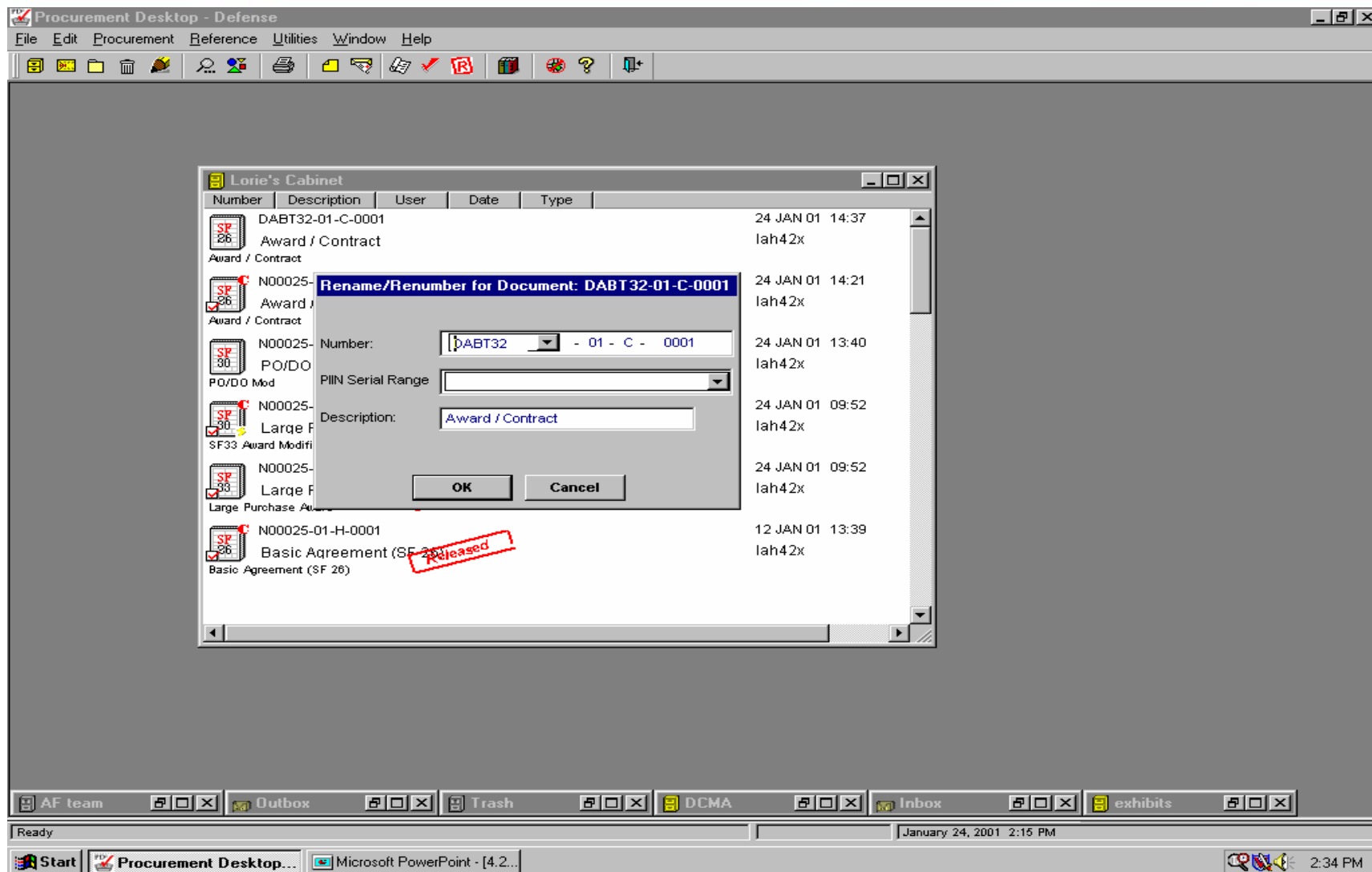
PIIN Serial Range

Description: Commercial Contract Award

OK Cancel

Change PIIN prior to Release in v4.2





Indefinite Delivery Contracts

- **No** work-around required in v4.2 for Cost type contracts. Tracks to dollars.
- You do not have to enter values for **quantity/price** and/or **description** for Indefinite Delivery Contracts or select **TBN** under **Cost Constraint** in the **Line Item Detail**; Null values are acceptable.

IDIQ Delivery Order Tracking in v4.1x

MATCHMAKER SCREEN

Contract

☒ SF 1442 N00025-01-D-0002
 SF1442 Award
 Construction Contract Award

Min Qty Min \$ Amt
 Max Qty Max \$ Amt

CLIN #	Description	Type
Remaining Quantity	Unit Cost	Remaining Cost
0001	construction work subject to Davis-Bacon FFP	
2,400,000	1.00	

Delivery/Task Order

☒ DD 1155 N00025-01-D-0002-0002
 Delivery/Task Order
 Delivery Order

Min Qty Min \$ Amt
 Max Qty Max \$ Amt

CLIN #	Description	Type
Quantity	Cost	CLIN Price

Report OK Cancel Attach

Tracked to Quantity only; you had to convert lump sum dollar amount to quantity. The unit cost and unit of issue are 1.00 lump sum (CAPS does not accept U. S. Dollars as a unit of issue).

IDIQ Delivery Order Tracking in v4.2

MATCHMAKER SCREEN

Delivery Order (DD 1155) - N00025-01-D-0002-0001

Contract
N00025-01-D-0002
Award / Contract
Award / Contract

Min Qty Min \$ Amt 5,000.00
Max Qty Max \$ Amt 636,000.00

Delivery/Task Order
N00025-01-D-0002-0001
Delivery Order (DD 1155)
Delivery Order (DD 1155)

Min Qty Min \$ Amt 5,000.00
Max Qty Max \$ Amt 212,000.00

CLIN #	Description	Type
0001	SERVICES	CPFF
	12000	200,000
0003	SERVICES	CPFF
	12000	200,000
0002	SERVICES	CPFF
	12000	200,000

CLIN #	Description	Type
0001	Services	CPFF
	50,000	53,000.00
0002	Services	CPFF
	50,000	53,000.00

Report OK Cancel Attach

Tracks to dollars for cost type contracts. Above each CLIN has a lump sum amount of \$200,000.00 plus a Fixed Fee of \$12,000.00; for a CLIN total of \$212,000.00. **NOTE: FOR A FFP TYPE OF CONTRACT YOU WILL STILL NEED TO PERFORM THE WORKAROUND OR WHEN YOU CREATE THE AWARD, SELECT TYPE OF CONTRACT AND AUTO CLAUSE SELECTION FOR A FIXED PRICE TYPE OF CONTRACT, GENERATE AND THEN CHANGE THE CONTRACT PRICING TYPE TO COST IN LINE ITEM DETAIL, APPROVE AND RELEASE; OR YOU CAN CREATE A CLIN TEMPLATE FOR A FIRM FIXED PRICE SERVICE CONTRACT, WHICH WILL REFLECT THE WORKAROUND HEADINGS.**

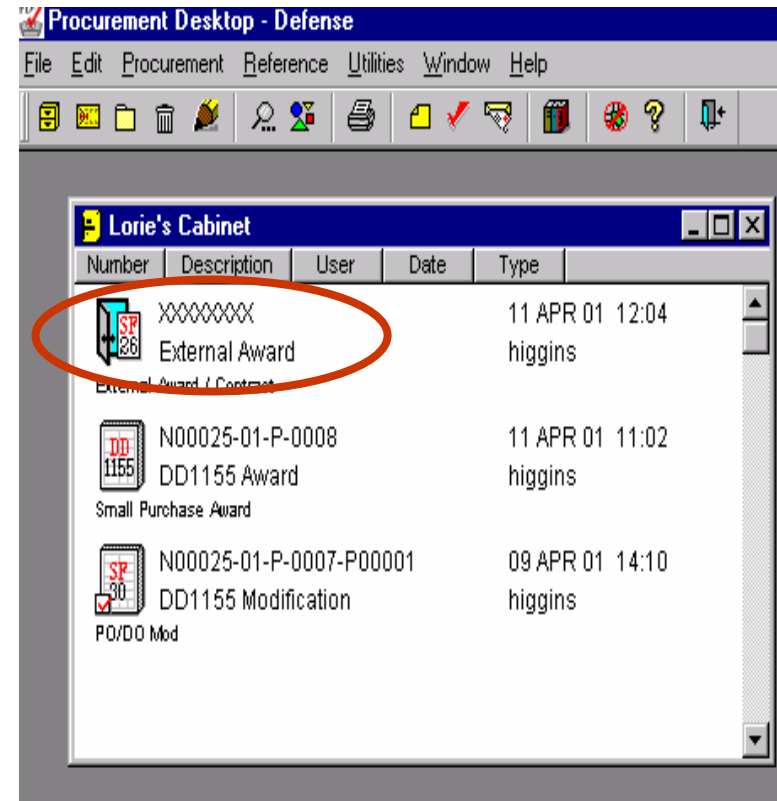
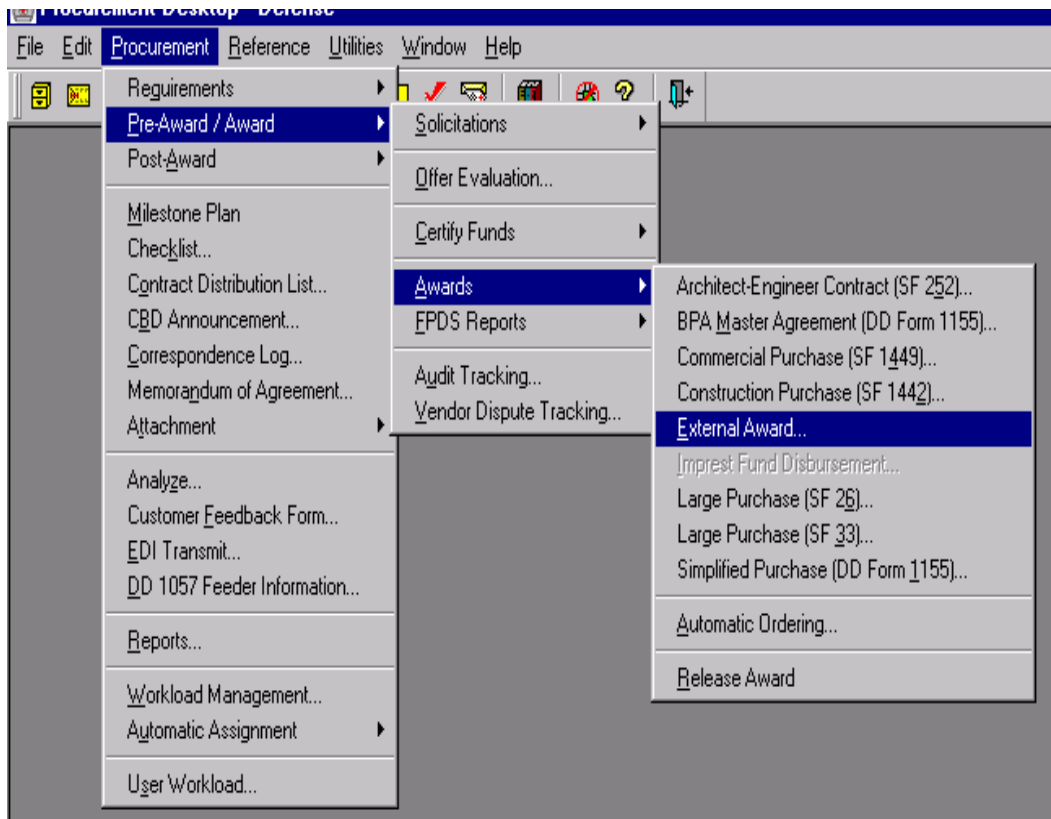
Delivery Order for CPFF in v4.2

ITEM NO	SUPPLIES/SERVICES	MAX QUANTITY UNDEFINED	UNIT Lump Sum	UNIT PRICE UNDEFINED	MAX AMOUNT
0001	SERVICES CPFF PURCHASE REQUEST NUMBER: IDC SRVCS				UNDEFINED
				MAX COST	\$50,000.00
				FIXED FEE	\$3,000.00
				TOTAL MAX COST + FEE	\$53,000.00
	ACRN AA Funded Amount				\$53,000.00

ITEM NO	SUPPLIES/SERVICES	MAX QUANTITY UNDEFINED	UNIT Lump Sum	UNIT PRICE UNDEFINED	MAX AMOUNT
0003	SERVICES CPFF PURCHASE REQUEST NUMBER: IDC SRVCS				UNDEFINED
				MAX COST	\$50,000.00
				FIXED FEE	\$3,000.00
				TOTAL MAX COST + FEE	\$53,000.00
	ACRN AA Funded Amount				\$53,000.00

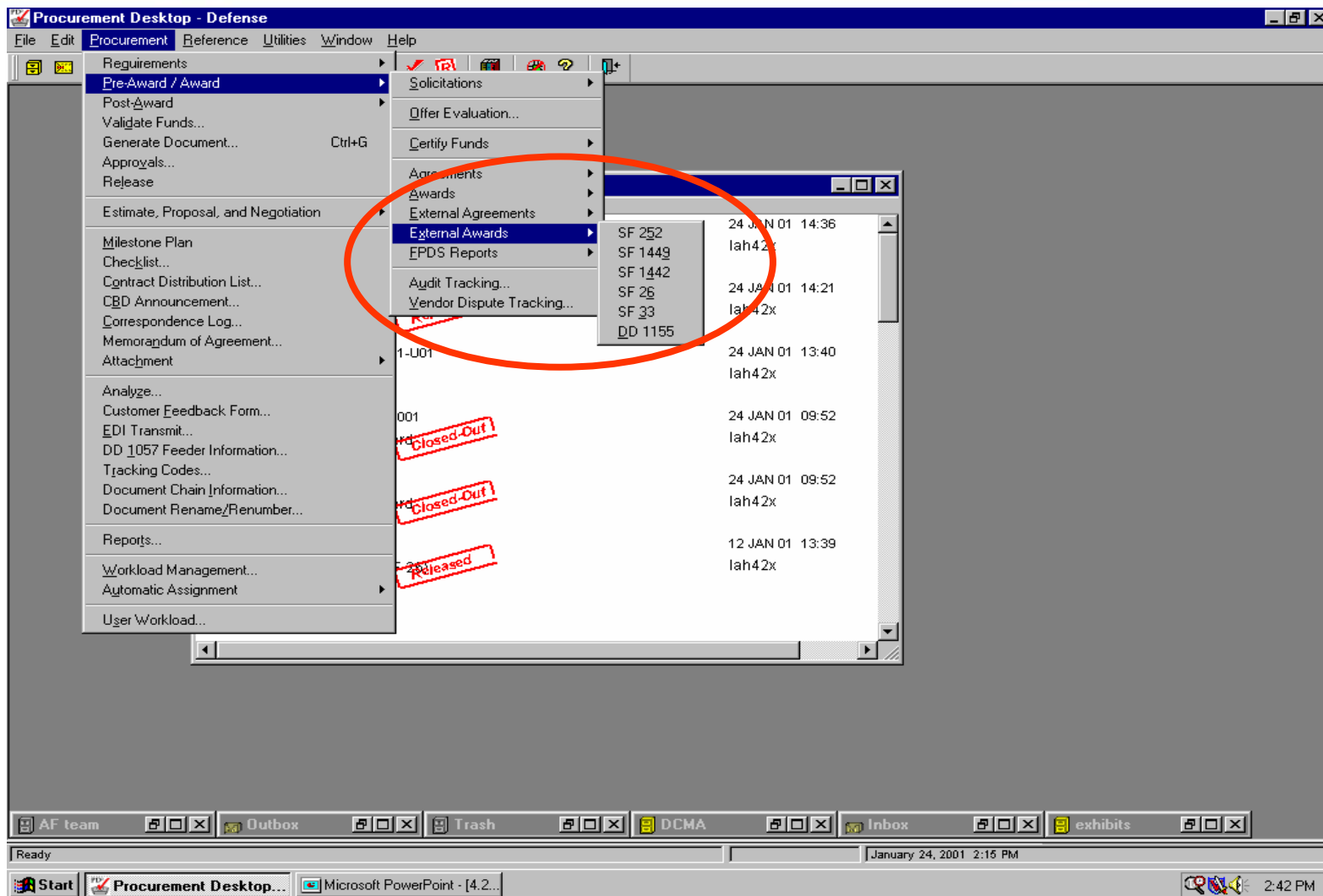
All amounts were captured appropriately when matched (see the previous slide).

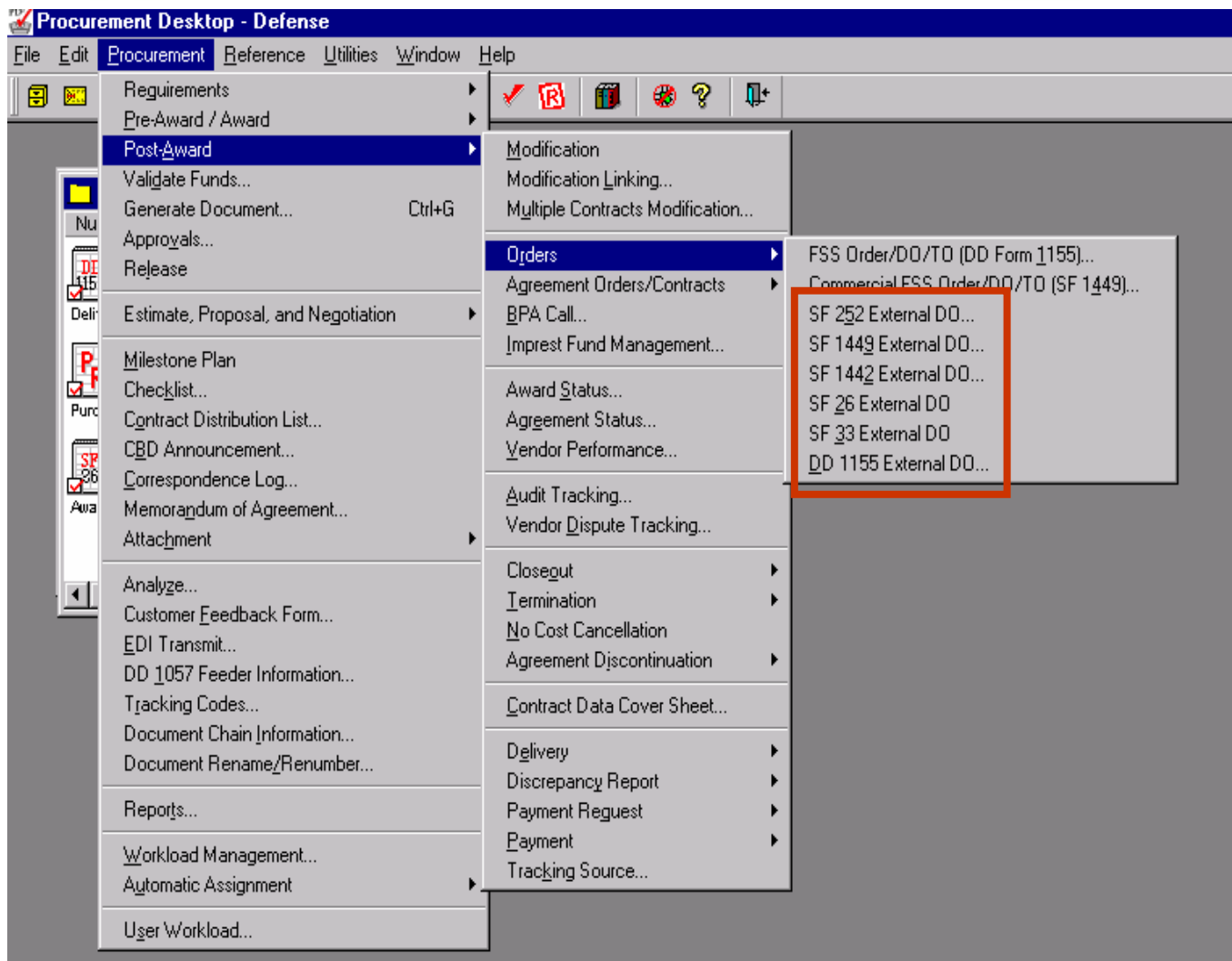
- Can create External Awards on all types of forms (SF 26, SF 33, SF 252, SF 1442, SF 1449, and DD 1155) from which delivery orders can be created in v4.2.
- Cannot do modifications to External Awards; that functionality is still the same. You simply unapprove the External Award, make changes and re-approve.



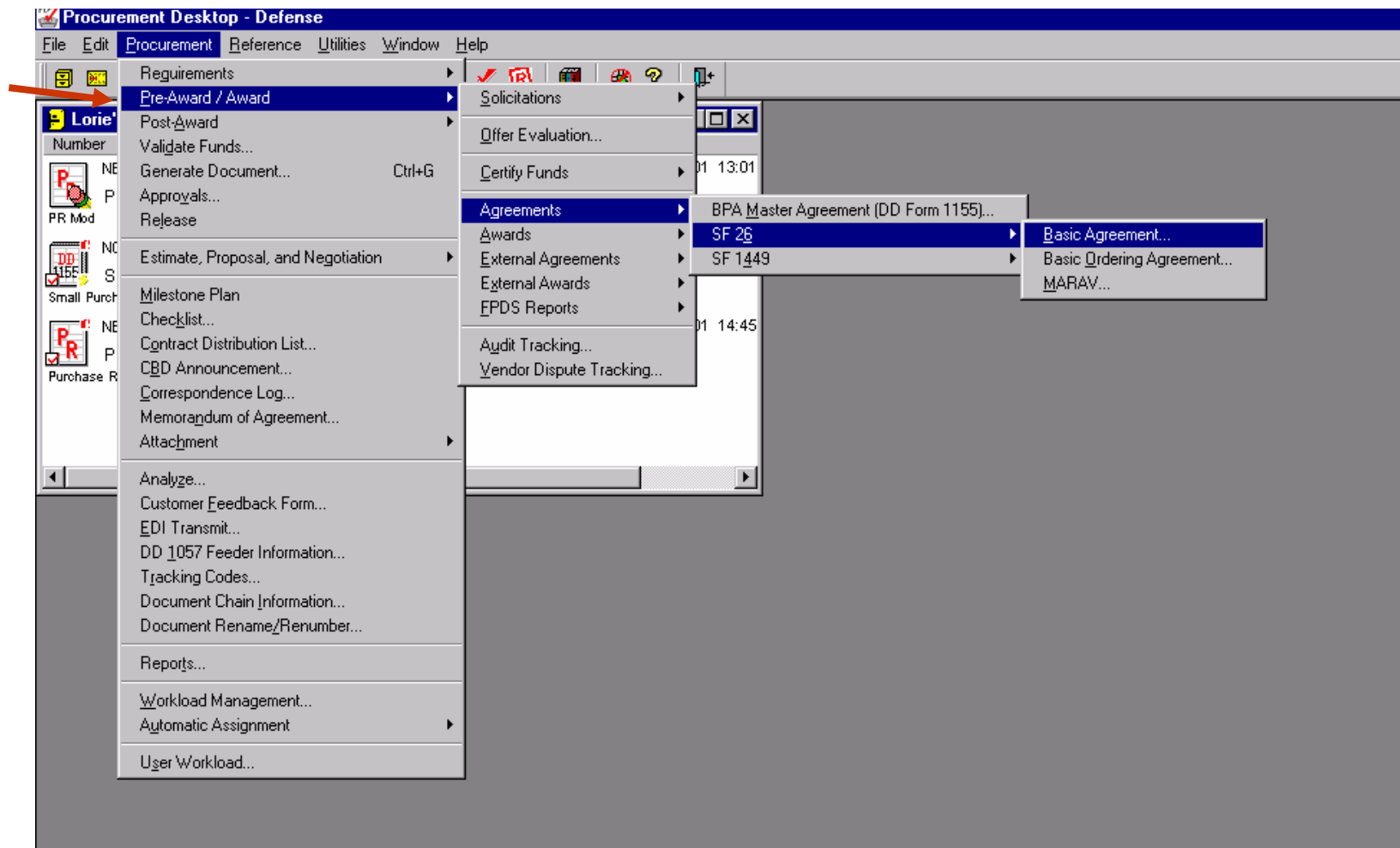
Please note that you do not have a selection of External Award documents; you must use the SF 26.

External Awards in v4.2





- No functionality in other versions of PD²
- Can create BA's and BOA's with or without line items, quantities and/or prices. Null Values are acceptable.



SF 26 Award against a BA in v4.2

Procurement Desktop - Defense

File Edit **Procurement** Reference Utilities Window Help

Requirements
Pre-Award / Award
Post-Award
Validate Funds...
Generate Document... Ctrl+G
Approvals...
Release
Estimate, Proposal, and Negotiation
Milestone Plan
Checklist...
Contract Distribution List...
CBD Announcement...
Correspondence Log...
Memorandum of Agreement...
Attachment
Analyze...
Customer Feedback Form...
EDI Transmit...
DD 1057 Feeder Information...
Tracking Codes...
Document Chain Information...
Document Rename/Renumber...
Reports...
Workload Management...
Automatic Assignment
User Workload...

Modification
Modification Linking...
Multiple Contracts Modification...
Orders
Agreement Orders/Contracts
BPA Call...
Imprest Fund Management...
Award Status...
Agreement Status...
Vendor Performance...
Audit Tracking...
Vendor Dispute Tracking...
Closeout
Termination
No Cost Cancellation
Agreement Discontinuation
Contract Data Cover Sheet...
Delivery
Discrepancy Report
Payment Request
Payment
Tracking Source...

DD 1155
SF 26
SF 1449
Telecommunications Order

Lorie's Cabinet

Number	Description	User	Date	Type	
	Small Purchase				28 M, higg
	Folder				
N00025-01-H-0001	Basic Agreement (SF 26)				28 M, higg
	Basic Agreement (SF 26)				
NEW REQN-0001					28 M, hinn
DD Mod					

Released

BA/BOA(s) with Null Values in v4.2

SEE SCHEDULE							
15G. TOTAL AMOUNT OF CONTRACT							\$0.00
16. TABLE OF CONTENTS							
(X) SEC.	DESCRIPTION	PAGE(S)	(X) SEC.	DESCRIPTION			
PART I - THE SCHEDULE			PART II - CONTRACT CLAUSES				
X	A	SOLICITATION/CONTRACT FORM	1 - 2	I	CONTRACT CLAUSES		
X	B	SUPPLIES OR SERVICES AND PRICES/COSTS	3	PART III - LIST OF DOCUMENTS, EXHIBITS AND OTHER ATTACHMENTS			
	C	DESCRIPTION/ SPECS. / WORK STATEMENT		J	LIST OF ATTACHMENTS		
	D	PACKAGING AND MARKING		PART IV - REPRESENTATIONS AND INSTRUCTIONS			
X	E	INSPECTION AND ACCEPTANCE	4	K	REPRESENTATIONS, CERTIFICATIONS AND OTHER STATEMENTS OF OFFERORS		
X	F	DELIVERIES OR PERFORMANCE	5	L	INSTRS., CONDS., AND NOTICES TO OFFERORS		
	G	CONTRACT ADMINISTRATION DATA		M	EVALUATION FACTORS FOR AWARD		
	H	SPECIAL CONTRACT REQUIREMENTS					
CONTRACTING OFFICER WILL COMPLETE ITEM 17 OR 18 AS APPLICABLE							
17. <input checked="" type="checkbox"/> CONTRACTOR'S NEGOTIATED AGREEMENT <small>Contractor is required to sign this document and return <u>copy to issuing office.</u> Contractor agrees to furnish and deliver all items or perform all the services set forth or otherwise identified above and on any continuation sheet for the solicitation stated herein. The rights and obligations of the parties to this contract shall be subject to and governed by the following documents: (a) this award/contract (b) the solicitation, if any, and (c) such provisions, representations, certifications, and specifications, as are attached or incorporated by reference herein. (Attachment are listed herein.)</small>				18. <input type="checkbox"/> AWARD <small>(Contractor is not required to sign this document.)</small> Your offer on Solicitation Number _____ REF: Vendor price list of 3/15/01 including the additions or changes made by you which additions or changes are set forth in full above, is hereby accepted as to the items listed above and on any continuation sheet. This award consummates the contract which consists of the following documents: (a) the Government's solicitation and your offer, and (b) this award/contract. No further contractual document is necessary.			
19A. NAME AND TITLE OF SIGNER <small>(Type or print)</small>				20A. NAME AND TITLE OF CONTRACTING OFFICER LORIE A. HIGGINS / CONTRACTING OFFICER TEL: 202-685-9150 EMAIL: lorie.higgins@navfac.navy.mil			
19B. NAME OF CONTRACTOR			19C. DATE SIGNED	20B. UNITED STATES OF AMERICA		20C. DATE SIGNED	
BY _____ <small>(Signature of person authorized to sign)</small>				BY LORIE HIGGINS <small>(Signature of Contracting Officer)</small>		28-Mar-2001	

NSN 7540-01-152-8049

26-107

STANDARD FORM 24 (REV. 4-85)

File Edit View Insert Format Tools Table Window Help

100% Close ?

1 2 3 4 5 6 7

N00025-01-H-0001

Page 3 of 5

Section B - Supplies or Services and Prices

ITEM NO	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT
0001	Services for consulting FFP				
				NET AMT	\$0.00
	Funded Amount				\$0.00

Foreign Address Layouts in v4.2

- New SA task allows for the creation of address layout for any country, FPO/APO.
- Displays and prints the address layout for countries specified in the new task, establishes a default format for the site.



System Administration

Tasks

- Addr. Layout
- Analysis
- Approval
- Attachment
- Auto Closeout

Address Layout Maintenance-Update

Layout Name:

Default Format: ☐

Address Format

Organization Name	Contact		
Street Addr Ln 1			
State	City		

Left Right Up Down

OK Cancel

Close

Address Layout Details

Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Basic Agreement

Items 1 - 10

AWARD / CONTRACT

2. CONTRACT (Procurement)
N00025-01-H-0001

5. ISSUED BY
NAVAL FACILITIES

Address Layout Details

Layout Name: Standard (U.S.)

Standard (U.S.)
BOSNIA ADDRESS LAYOUT
N. WALES ADDRESS LAYOUT
GERMANY ADDRESS LAYOUT
APO/FPO ADDRESS LAYOUT

7. NAME AND ADDRESS OF CONTRACTOR (No., street, city, county, State and Zip Code)
AMERICAN MANAGEMENT SYSTEMS, INC.

8. DELIVERY
[] FOB ORIGIN [X] OTHER (See Below)

9. DISCOUNT FOR PROMPT PAYMENT
NET

10. SUBMIT INVOICES (4 copies unless otherwise specified)
Submit 4 copies to the address shown in: Block 5

CODE: FACILITY CODE

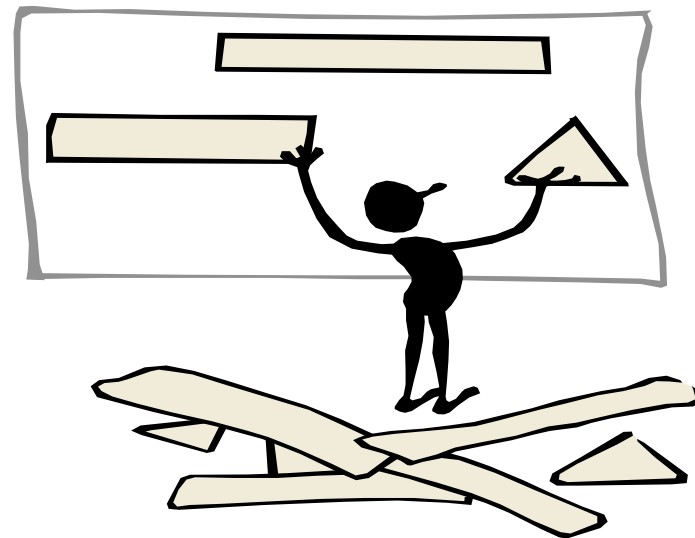
Details... Delete Details... Add

Details... Add

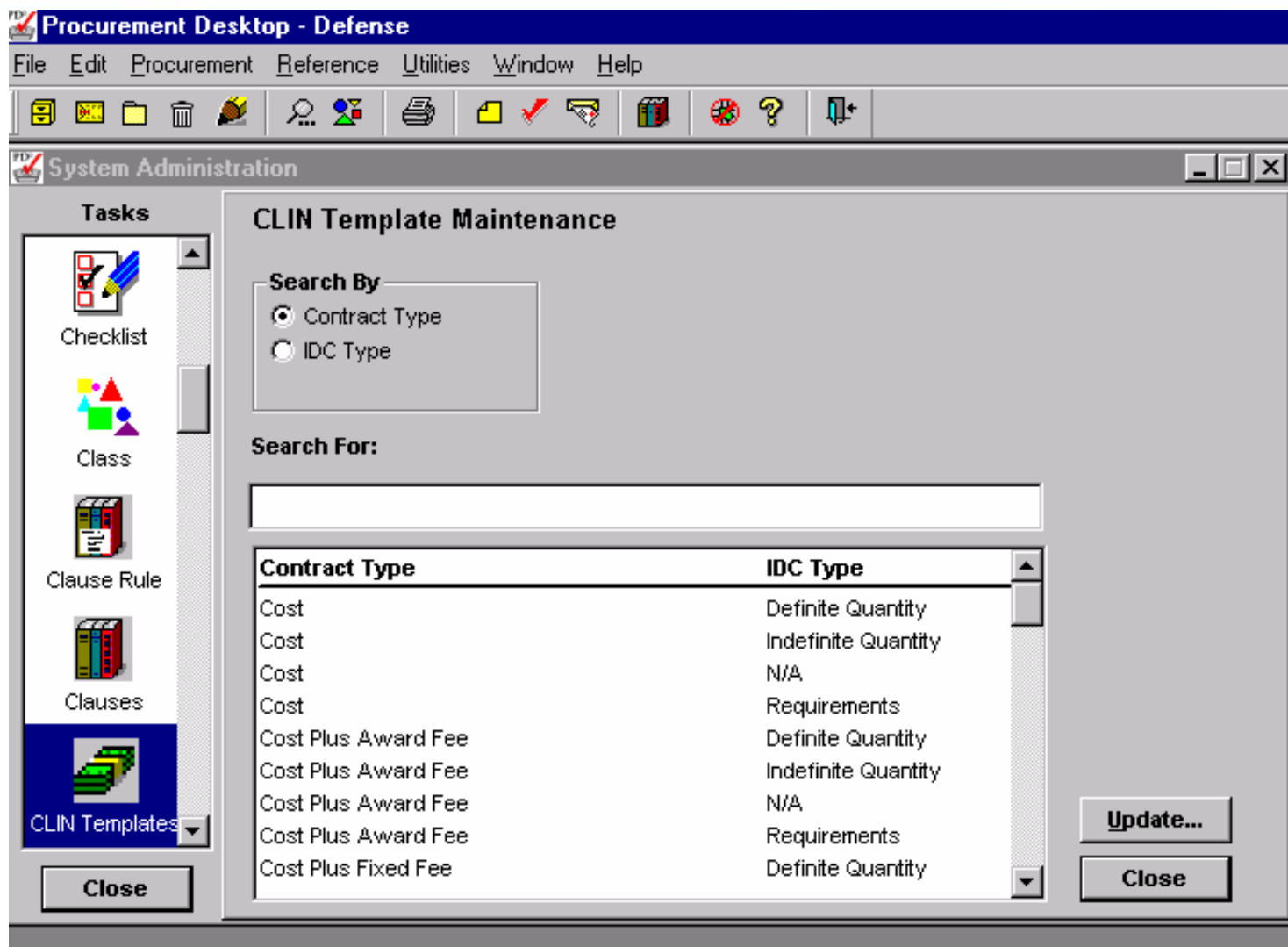
Add

CLIN Templates

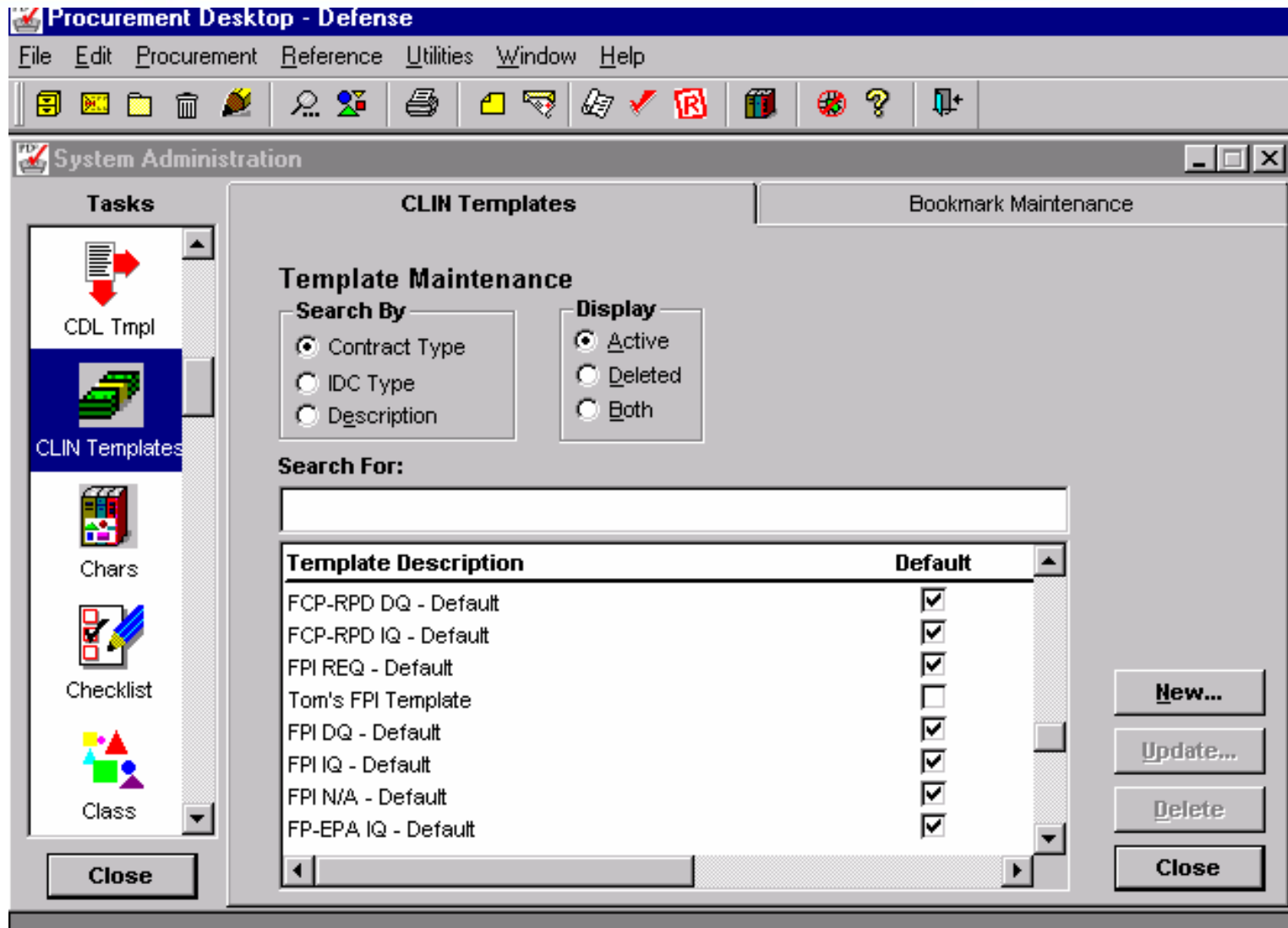
- SA's are able to create an unlimited number of new CLIN templates per contract type in v4.2.
- ONLY one CLIN template per contract type in v4.1x, i.e. 1/FPIDIQ;
- 1/FPIDR, 1/CFFF, etc.



CLIN Templates in v4.1x



CLIN Templates in v4.2



System Administration

Tasks

- CDL Tmpl
- CLIN Templates**
- Chars
- Checklist
- Class

Contract Type: FFP IDC Type: N/A Default: ☐

Template Description: Demo

Bookmarks

Available:		In Template:
share_ratio_above	➔ ➜	acrn
share_ratio_below		clin_desc
shelf_life_cd		clin_nmbr_cd
ship_mode		fsc_desc
sic_cd		ext_desc
sic_desc		nsn
signal_code		clin_qy
smic		funded_amt
spec_nmbr		fsc_cd
stepladder		
subtotal_cost_plus_base		
sup_org		
target_cost		

Include Bookmarks ☒

Edit... **Cancel**

Close

- Moved to the *Detail* tab in **Line Item Detail**
- **Search** button allows you to select from the NSN database.
- Automatically populates applicable fields in the **Line Item Detail**

Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Line Item Detail - [Read Only]

Detail Description Pricing Funding Shipping Payment Local Info

Line Item Number: 0001 construction work subject to Davis-Bacon Global Chg

Add Manufacturer:

Manufacturer Part Number:

Vendor Part Number:

Prod / Cat Number:

Drawing Number:

Spec. Number:

Serial Number: SMIC:

Piece Number: Cognizance Sym:

Model Number: Media/Status CD:

NSN: Color:

Size: Signal CD:

Suggested Contract Vehicle/GSA Schedule:

Project:

Inspection/Acceptance

Codes

FSC:

SIC:

PROG:

WSC:

OK

Cancel

larry's cabinet NGB team cabinet

Ready March 28, 2001 10:52 AM

Start Lorie Higgins - Inbox - Lotu... Microsoft PowerPoint - [diff... Procurement Desktop... PD-SQLAnywhere-32bit 10:52 AM

Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Line Item Detail

Detail Description Pricing Funding Shipping Payment Local Info

Line Item Number: 0001 Contract Type: FFP IDC Type: N/A

NSN Search

CLIN Type: Priced Info Only

Global Chg... Test Info Delivery

NSN Search

Search Criteria

Search by:

NSN: ☒ Description: ☐

%

Search Results:

NSN:	Description	Unit of Issue	Var Qty +	Var Qty -	Brand Name/ Sole Source
1005-00-118-6192	Firing Attachment, Blank	Each	10	10	BN
M-16 rifle attachment for firing blanks. Forces blank shell ejection. 1-5/8" x 1-1/2" x 1-3/16" frame assembly, hexagonal bushing, threaded restrictor, 1-1/4" diameter pull ring. Palletized. Standard Pack: 1/50. Shipping Weight: 13.4 pounds. Spec.					
1005-00-288-3565	Swab, Small Arms Cleaning	Each			BN
These swabs are made of unbleached, clean, single evenly developed cotton cloth. They are of two sizes, 1-3/8" x 1-3/8" and 2-9/16" x 2-9/16". Swabs are packed in chipboard boxes according to size. Swabs made per Army drawings #11686408 and #3565 - 30.					
1005-00-312-7177	Sling, Padded, Adjustable	Each			
Heavy textile webbing. Approximately 5-1/2 feet long. Used with the M-60 machine gun. Padded area about 18" x 2" in center of sling. Metal levers on each end. Black. Spec outlined in Data List #12000083. Standard					

Search Select Cancel

AF team Outbox Trash DCMA Inbox exhibits

Ready January 24, 2001 2:15 PM

Start Procurement Desktop... Microsoft PowerPoint - [4.2...]

3:13 PM

Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Award / Contract - DABT32-01-C-0001

Items 1 - 10 Items 11 - 15 Items 16 - 20 Clauses

11. SHIP TO CODE 12. PAYMENT WILL BE MADE BY CODE S49451

See Schedule

13. AUTHORITY FOR USING OTHER OPEN COMPETITION:
☐ 10 U.S.C. 2304(c) ☐

15. Item/Subitem Number Description

15 G. Total Cost

Basic A

Line Item Detail

Detail Description Pricing Funding Shipping Payment Local Info

Line Item Number 0001 Contract Type **Change** FFP IDC Type N/A

NSN **Search** 1005-00-288-3565 CLIN Type ☒ Priced ☐ Info Only

Description Swab, Small Arms Cleaning

Extended Description These swabs are made of unbleached, clean, single evenly developed cotton cloth. They are of two sizes, 1-3/8" x 1-3/8" and 2-9/16" x 2-9/16". Swabs are packed in chipboard boxes according to size. Swabs made per Army drawings #11686408 and #3565 - 30.

Quantity Unit Price Line Item Cost

Item Calculation X

Unit of Issue Each Options Opt # Cost Constraint

Stepladder Pricing ☐ Test Type No Test ☐ Exhibit ☐ Include Sublines

Template FFP N/A - Default

Global Chg...
Test Info
Delivery
Copy
CLIN
Add
Insert
SubCLIN
Add
Insert
Delete
Associate
OK
Cancel

AF team Outbox Trash DCMA Inbox exhibits

Ready January 24, 2001 2:15 PM

Start Procurement Desktop... Microsoft PowerPoint - [4.2...]

3:15 PM

Delivery in v4.1x

Line Item Detail Modifications - [Read Only]

Detail Description Pricing Funding Shipping Payment Local Info

Line Item Number: 0001 Contract Type: FFP IDC Type: Indefinite Quantity Hand Carry: ☐

Delivery Date: 30-Mar-2001 CLIN Type: ☒ Priced ☐ Info Only

Description: wldgits

Extended Description:

Item Information	Max Quantity	Unit Price	Max Line Item Cost
	0.00	0.00	0.00
Amount of Mod.	2,500.00	25.00	62,500.00
New Totals	2,500.00	25.00	62,500.00

Period of Performance: Start Date: End Date: Period: ☒ Base ☐ Option Opt #: Cost Constraint:

Test Type: Unit of Issue: Each No Test ☐ Exhibit ☐ Include Sublines

Stepladder Pricing: ☐

Global Chg Test Info CLIN Add Insert SubCLIN Add Insert Delete Associate OK Cancel

Line Item Detail Modifications - [Read Only]

Detail Description Pricing Funding Shipping Payment Local Info

Line Item Number: 0001 wldgits

Address: 1 CONS/CC JANE SMITH / PROGRAM MANAGER 74 NEALY AVENUE SUITE 109 LANGLEY AFB VA 23665-2088 CODE: F44600

FOB: Destination

Add'l Markings:

Charge Shipping To:

Shipping Mode:

MILSTRIP:

HAZMAT:

Transport Control:

Transport Priority:

Delete Packing... OK Cancel

No Multiple Deliveries; only one Date, Qty & Ship to address allowed per CLIN.

Delivery in v4.2

Line Item Detail [X]

Detail | Description | Pricing | Funding | Shipping | Payment | Local Info

Line Item Number: Contract Type: FFP IDC Type: Hand Carry: ☐

NSN: CLIN Type: ☒ Priced ☐ Info Only

Description: Extended Description:

Quantity: Unit Price: Line Item Cost:

Item Calculation: Options: Opt #: Cost Constraint:

Unit of Issue: Stepladder Pricing: ☐ Test Type: Exhibit: ☐ Include Sublines: ☐

Template:

Global Chg...
Test Info
Delivery (highlighted with an orange arrow)
Copy
CLIN
Add
Insert
SubCLIN
Add
Insert
Delete
Associate
OK
Cancel

Delivery Schedule in v4.2

Delivery Schedule (Read-Only)

Line Item Information

Number: 0001 Total Quantity: 1500

Description: widgets

Sort by: ☒ Date ☐ Location

Date	Quantity	Location
27-Apr-2001	500.00	1 CONS/CC
27-Apr-2001	500.00	15 CONS/LGC
18-May-2001	500.00	1 CONS/CC

Buttons: Add, Delivery, POP, Change, Copy, Delete, View, OK, Cancel

Delivery Schedule

Line Item Information

Number: 0001 Total Quantity: 1

Description: services

Sort by: ☒ Date ☐ Location

Delivery Date: 13-Apr-2001 or: ()

Quantity: 1.00

Address:

CODE: F44600

1 CONS/CC

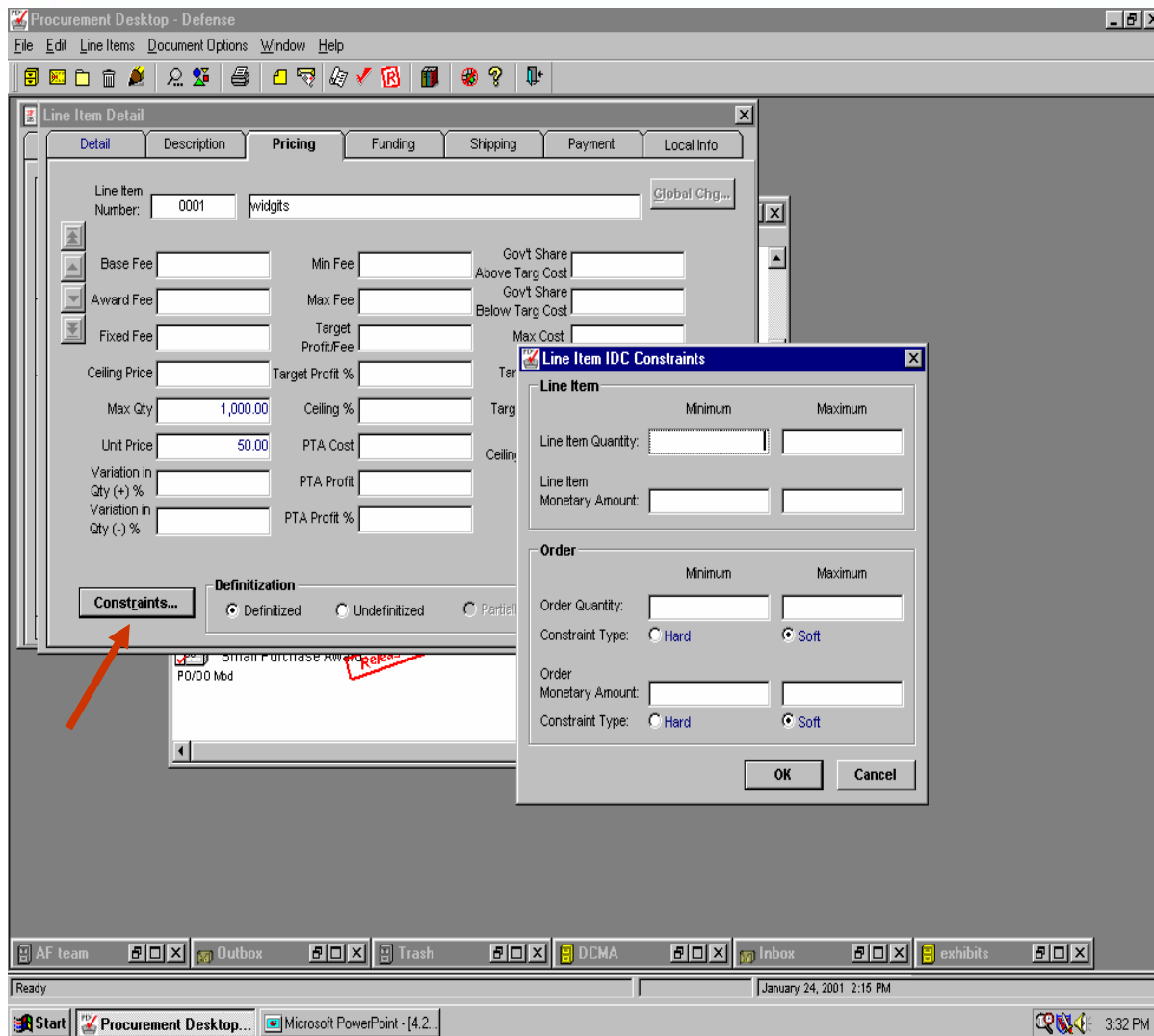
Buttons: Details..., Delete, OK, Cancel

You can add as many deliveries (quantities, dates and addresses) as required; just click on the **[Delivery]** (or **POP**) button; the **Delivery** window opens and you can select and/or input the data.

- Add, change, delete, view and print the Min/ Max order quantity AND monetary amount.
- Can classify these order constraints as hard (error) or soft (warning). Warnings allow you to exceed constraints.



Line Item Constraints in v4.2



Maximum Constraints Hard or Soft Warnings in v4.2

Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Small F

Items

1. CONTR
N00025-I

4. REQUI

6. ISSUED
NAVAL

9. CONTR
AMERI

Detail

Document Classification

Solicitation Type

☐ RFQ

☐ RFP

☒ IFB

Contract Category

☐ Supply

☐ Service

☐ R&D

☐ Construction/A&E

Contract Sub-Category:

Pricing Structure:

Document Format:

IDC Constraints

	Minimum	Maximum
Contract Quantity:	<input type="text"/>	<input type="text"/>
Contract Amount:	<input type="text"/>	<input type="text"/>
Order Quantity:	<input type="text"/>	<input type="text"/>
Constraint Type:	<input type="radio"/> Hard	<input checked="" type="radio"/> Soft
Order Amount:	<input type="text"/>	<input type="text"/>
Constraint Type:	<input type="radio"/> Hard	<input checked="" type="radio"/> Soft

Ordering Period

Start Date: **End Date:**

Electronic Funds Transfer (EFT)

EFT ☒

Excl. Reason:

OK Cancel

- Layout improved to accommodate each service
- ACRN's can now be assigned manually
- Copy capability so you can edit existing funding strips
- Contract ACRN's are assigned and visible when line of accounting is selected, not upon generation as in v4.1x.
- Funding amounts change automatically from the **Line Item Detail**

Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Funding Sources

Line Item Information

Number 0001 Description Tanks

Total Cost \$1,000,000.00

Funding Strip [dropdown] Cost Code 000000000000 New...

Amount 1,000,000.00 Fund ACRN TAC

Job Order Expiration Dt Quantity Funded Amt TAC Amount FMS Case

Total Qty: 0.00 Total \$:

Add... Change...

Total Funded Amt

New Funding Source

New Funding Source

Funding Strip E930938U2Q0329R509309RFJF9302029R592020920FKJ

OK Cancel

OK Cancel

F44600-01-A-0002 06 DEC 00 17:42
Brenda jmoss
Blanket Purchase Master Agreement

F44600-01-C-0004 04 DEC 00 10:26
For Lorie jmoss
Commercial Contract Award

Released

Ready January 22, 2001 7:05 PM

Start Jen... Acq... Mic... Pro... PD... Mic...

7:05 PM

- **Line Item Detail** window opens
- Go to *Funding* Tab and click on the [**Add**] button
- The **Funding Sources** window opens; select [**New**] or [**Search**]; the **Line of Accounting (LOA) Search** window opens, go to **Search Format** and scroll down to ARMY and select. Click on [**Search**] button and the LOAs appear. You can select or copy and change. Click [**OK**] and the ACRN appears, which is editable.
- Once you select a LOA for the contract, if you need to use the same LOA, just use the scroll down button on the **Funding Sources** window.

Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Funding Sources

Line Item Information

Number 0001 Description things

Total Cost \$30.56

Contract ACRN Assignment

Manual ☐ ACRN ☒ Funding Strip New...

Amount

Job Order Information

Job Order

Total Qty

Funding Source - New

Funding Format: Army

Funding Source

Department Code (2):	21	Issuing Department Code (2):	09
Fiscal Year (4):	2001	Treasury Account Number (4):	4342
Subhead / Limit (4):	1234	Accounting Station Number (8):	45354242
Program Year (1):	1	Operating Agency Code (2):	32
Allotment Serial Number (4):	3453	Project Account (11):	34364364363
Element Of Resource (4):	5346	Standard Document Number (14):	DABT1101D12345
Account Processing Code (6):	534645	AAA / Station Number (8):	84939382
CPN Recipient / Organization (6):	948424		

Display:

21 09 2001 4342 1234 45354242 1 32 3453 34364364363 5346 DABT1101D12345 534645 84939382 948424

OK Cancel

AF team Outbox Trash DCMA Inbox

Ready January 24, 2001 12:57 PM

Start Procurement Desktop... Microsoft PowerPoint - [4.2...]

v4.2 Copy Capability

Fiscal Year (4):	2222	Treasury Account Number (4):	2222
Subhead / Limit (4):	2222	Accounting Station Number (8):	22222222
Program Year (1):	2	Operating Agency Code (2):	22
Allotment Serial Number (4):	2222	Project Account (11):	22222222222
Element Of Resource (4):	2222	Standard Document Number (14):	22222222222222
Account Processing Code (6):	222222	AAA / Station Number (8):	22222222
CPN Recipient / Organization (6):	222222		

Display:

21 22 2222 2222 2222 22222222 2 22 2222 222222222222 2222 2222222222222222 222222 22222222 222222

OK Cancel

4):

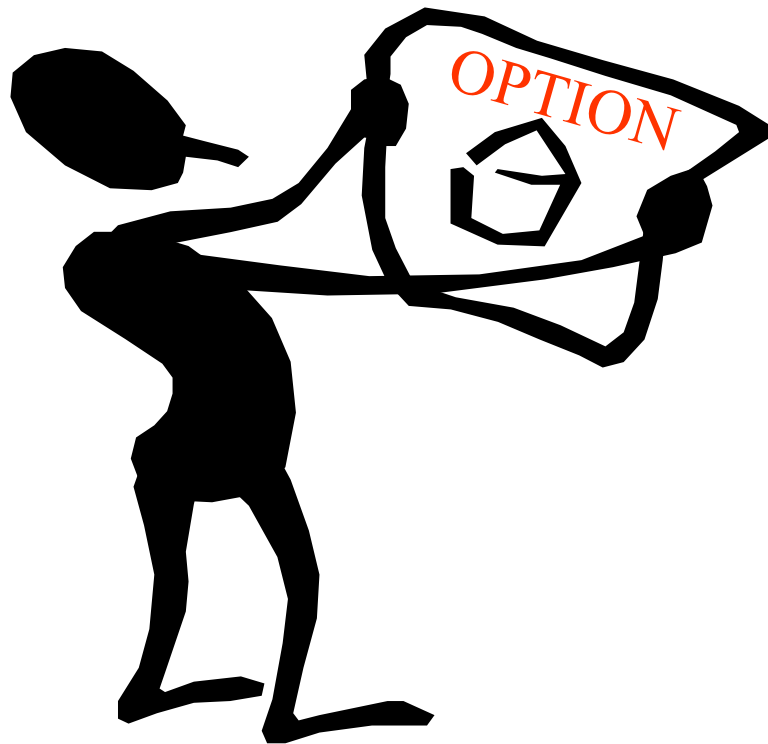
%
%
%
%
%
%
%

New... Select Copy...



Option Year Prints Out

- “Option Year” CLINs will be identified in printed documents



Programant Backtan Defina

Microsoft Word - Document in Commercial Contract Award - DABT10-01-C-0100

File Edit View Insert Format Tools Table Window Help

Normal Times New Roman 10 B I U

1 2 3 4 5 6 7

ITEM NO	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT
0001	Uniforms FFP	100.00	Each	\$100.00	\$10,000.00
				NET AMT	\$10,000.00
	ACRN AA Funded Amount				\$10,000.00

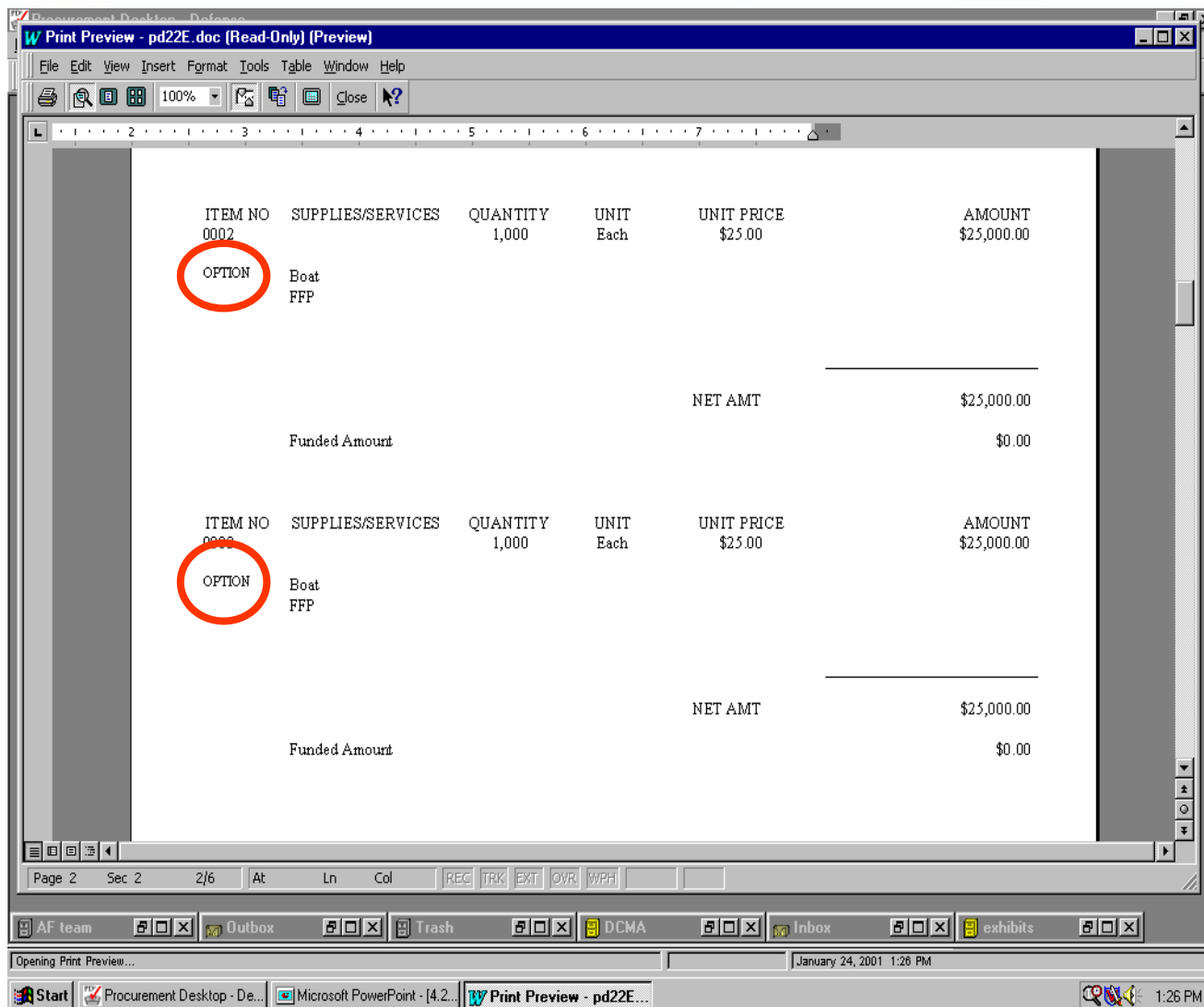
ITEM NO	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT
0002	Uniforms FFP	100.00	Each	\$100.00	\$10,000.00
				NET AMT	\$10,000.00

Page 2 Sec 2 2/3 At Ln Col REC TRK EXT OVR WPH

Ready January 22, 2001 7:35 PM

Start Jen... Acq... Mic... Pro... PD... Mic...

7:35 PM



“EST” and “NSP”

- “EST” appears next to line item Costs
- Only “NSP” appears in the line item **Total Cost** column when NSP cost constraint is chosen.

W Print Preview - pd235.doc (Read-Only) (Preview)

File Edit View Insert Format Tools Table Window Help

100% Close

N00025-01-C-0004

Page 2 of 7

Section B - Supplies or Services and Prices

ITEM NO	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT
0001		1,000	Each	\$25.00	\$25,000.00 EST
	Boat FFP				
				NET AMT	\$25,000.00 (EST.)
	ACRN AA Funded Amount				\$25,000.00
0002		1,000	Each	\$25.00	\$25,000.00
	Boat FFP				
				NET AMT	\$25,000.00
	ACRN AB Funded Amount				\$25,000.00
0003		1,000	Each	\$250.00	\$250,000.00 EST
	Boat FFP				

Page 2 Sec 2 2/6 At Ln Col REC TRK EXT OVR WPH

Start Procurement Desktop - De... Microsoft PowerPoint - [4.2... W Print Preview - pd235... 2:05 PM

W Print Preview - pd235.doc (Read-Only) (Preview)

File Edit View Insert Format Tools Table Window Help

100% Close

1 2 3 4 5 6 7

N00025-01-C-0004

Page 3 of 3

ITEM NO	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT NSP
000301	boat, jet black FFP 500 each				
				NET AMT	\$0.00
	Funded Amount				\$0.00
000302	boat, royal blue FFP 500 each				
				NET AMT	\$0.00
	Funded Amount				\$0.00

Page 3 Sec 2 3/6 At Ln Col REC TRK EXT OVR WPH

Start Procurement Desktop - De... Microsoft PowerPoint - [4.2...] W Print Preview - pd235... 2:08 PM

Confirming Orders in v4.2

Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Small Purchase

Items 1 - 13

7 - 25 Clauses

SERVICES PAGE 1 OF 1

1. CONTRACT/PURC NO0025-01-P-0003

4. REQUISITION / P

6. ISSUED BY NAVAL FACILITIES

ADMINISTERED BY CODE

See Item 6

8. DELIVERY FOB ☐ DEST ☒ OTHER (See Schedule 11000)

9. CONTRACTOR CODE 22332 AMERICAN MANAGEMENT SYSTEMS, INC.

10. DELIVER TO FOB POINT BY SEE SCHEDULE

11. MARK IF BUSINESS IS ☐ SMALL ☐ SMALL DISADVANTAGED ☐ WOMEN-OWNED

12. DISCOUNT TERMS NET

13. MAIL INVOICES TO THE ADDRESS IN BLOCK

Details... Delete

FACILITY Add

Confirming Order

Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Small Purchase

Items 1 - 13

7 - 25 Clauses

SERVICES PAGE 1 OF 1

1. CONTRACT/PURC NO0025-01-P-0003

4. REQUISITION / P

6. ISSUED BY NAVAL FACILITIES

ADMINISTERED BY CODE

See Item 6

8. DELIVERY FOB ☐ DEST ☒ OTHER (See Schedule 11000)

9. CONTRACTOR CODE 22332 AMERICAN MANAGEMENT SYSTEMS, INC.

10. DELIVER TO FOB POINT BY SEE SCHEDULE

11. MARK IF BUSINESS IS ☐ SMALL ☐ SMALL DISADVANTAGED ☐ WOMEN-OWNED

12. DISCOUNT TERMS NET

13. MAIL INVOICES TO THE ADDRESS IN BLOCK

Details... Delete

FACILITY Add

Confirming Order

Confirming Orders and Vendor Quotes referenced on DD Form 1155 in v4.2

Print Preview - pu270.doc (Read-Only) (Preview)

File Edit View Insert Format Tools Table Window Help

100% Close

GARY DUNHILL 123 MAIN ST SUITE 45 BOX 67 RESTON VA 21171		12. DISCOUNT TERMS NET		<input type="checkbox"/> SMALL DISADVANTAGED <input type="checkbox"/> WOMEN-OWNED	
		13. MAIL INVOICES TO THE ADDRESS IN BLOCK See Item 6			
14. SHIP TO SEE SCHEDULE		CODE	15. PAYMENT WILL BE MADE BY DFAS-COLUMBUS CENTER DFAS-CO-JNB/BUNKER HILL P.O. BOX 182077 COLUMBUS OH 43218-2077		CODE SC1016
MARK ALL PACKAGES AND PAPERS WITH IDENTIFICATION NUMBERS IN BLOCKS 1 AND 2.					
16. TYPE OF ORDER	DELIVERY/ CALL PURCHASE	<input checked="" type="checkbox"/> This delivery order call is based on another Govt agency or in accordance with and subject to terms and conditions of above numbered contract. Reference your quote dated 15-Mar-2001 Furnish the following on terms specified herein. REF: Vendor Quote #Q350			
ACCEPTANCE. THE CONTRACTOR HEREBY ACCEPTS THE OFFER REPRESENTED BY THE NUMBERED PURCHASE ORDER AS IT MAY PREVIOUSLY HAVE BEEN OR IS NOW MODIFIED, SUBJECT TO ALL OF THE TERMS AND CONDITIONS SET FORTH, AND AGREES TO PERFORM THE SAME.					
NAME OF CONTRACTOR		SIGNATURE		TYPED NAME AND TITLE	
<input type="checkbox"/> If this box is marked, supplier must sign Acceptance and return the following number of copies:		DATE SIGNED (YYYYMMDD)			
17. ACCOUNTING AND APPROPRIATION DATA/ LOCAL USE See Schedule					
18. ITEM NO.	19. SCHEDULE OF SUPPLIES/ SERVICES		20. QUANTITY ORDERED/ ACCEPTED*	21. UNIT	22. UNIT PRICE
	CONFIRMING ORDER - DO NOT DUPLICATE SEE SCHEDULE				
* If quantity accepted by the Government is same as quantity ordered, indicate by X. If different, enter actual quantity accepted below quantity ordered and encircle.			24. UNITED STATES OF AMERICA		25. TOTAL \$35,000.00
TEL:			29. DIFFERENCES		
EMAIL:					
BY:			CONTRACTING / ORDERING OFFICER		

Vendor Quotes

Referenced on SF 26 in v4.2

FDV Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Basic Agreement (SF 26) - N00025-01-H-0001

Items 1 - 10 Items 11 - 15 Items 16 - 20 Clauses

16. TABLE OF CONTENTS

(X)	SEC.	DESCRIPTION	PAGES	(X)	SEC.	DESCRIPTION	PAGES
PART I - THE SCHEDULE				PART II - CONTRACT CLAUSES			
<input checked="" type="checkbox"/>	A	SOLICITATION/CONTRACT FORM	1 - 1	<input type="checkbox"/>	I	CONTRACT CLAUSES	
<input type="checkbox"/>	B	SUPPLIES OR SERVICES AND PRICES/COSTS		PART III - LIST OF DOCUMENTS, EXHIBITS, AND OTHER ATTACHMENTS			
<input type="checkbox"/>	C	DESCRIPTION / SPECS. / WORK STATEMENT		<input type="checkbox"/>	J	LIST OF ATTACHMENTS	
<input type="checkbox"/>	D	PACKAGING AND MARKING		PART IV - REPRESENTATIONS AND INSTRUCTIONS			
<input type="checkbox"/>	E	INSPECTION AND ACCEPTANCE		<input type="checkbox"/>	K	REPRESENTATIONS, CERTIFICATIONS AND OTHER STATEMENTS OF OFFERORS	
<input type="checkbox"/>	F	DELIVERIES AND PERFORMANCE		<input type="checkbox"/>	L	INSTRS., CONDS., AND NOTICES TO OFFERORS	
<input type="checkbox"/>	G	CONTRACT ADMINISTRATION DATA		<input type="checkbox"/>	M	EVALUATION FACTORS FOR AWARD	
<input type="checkbox"/>	H	SPECIAL CONTRACT REQUIREMENTS					

17. ☒ CONTRACTOR'S NEGOTIATED AGREEMENT
(Contractor is required to sign this document and return copies to issuing office.)

2

20A. NAME AND TITLE OF CONTRACTING OFFICER

18. ☐ AWARD (Contractor is not required to sign this document)
Your offer on Solicitation Number
REF: Vendor price list quoted 3/15/14
, including the additions or changes made by you which additions or changes are set forth in full above, is hereby accepted as to the items listed above...

- No more blank last page!
- Page Breaks based on available space from the page above.
- KO's e-mail address & phone number will print out under his/ her name.

W Print Preview - pdsEE.doc (Read-Only) (Preview)

File Edit View Insert Format Tools Table Window Help

Close

120%

1 2 3 4 5 6

ACCEPTANCE. THE CONTRACTOR HEREBY ACCEPTS THE OFFER REPRESENTED BY THE NUMBER AS IT MAY PREVIOUSLY HAVE BEEN OR IS NOW MODIFIED, SUBJECT TO ALL OF THE AND CONDITIONS SET FORTH AND AGREES TO PERFORM THE SAME.

NAME OF CONTRACTOR _____

SIGNATURE _____

TYPED NAME AND TITLE _____

☐ If this box is marked, supplier must sign Acceptance and return the following number of copies:

17. ACCOUNTING AND APPROPRIATION DATA/LOCAL USE

See Schedule

18. ITEM NO.	19. SCHEDULE OF SUPPLIES/ SERVICES	20. QUANTITY ORDERED/ ACCEPTED*	21. UNIT	22. UNIT

CONFIRMING ORDER - DO NOT DUPLICATE

SEE SCHEDULE

24. UNITED STATES OF AMERICA
TEL: 202-682-9120
EMAIL: lorie.higgins@navsec.mil
BY: Lorie A. Higgins
CONTRACTING / ORDERING OFFICER
LORIE HIGGINS

* If quantity accepted by the Government is same as quantity ordered, indicate by X. If different, enter actual quantity accepted below quantity ordered and encircle.

26. QUANTITY IN COLUMN 20 HAS BEEN

☐ INSPECTED ☐ RECEIVED ☐ ACCEPTED, AND CONFORMS TO THE CONTRACT EXCEPT AS NOTED

27. SHIP NO. _____

28. DO VOUCHER NO. _____

29. PAID BY

☐ PARTIAL ☐ FINAL

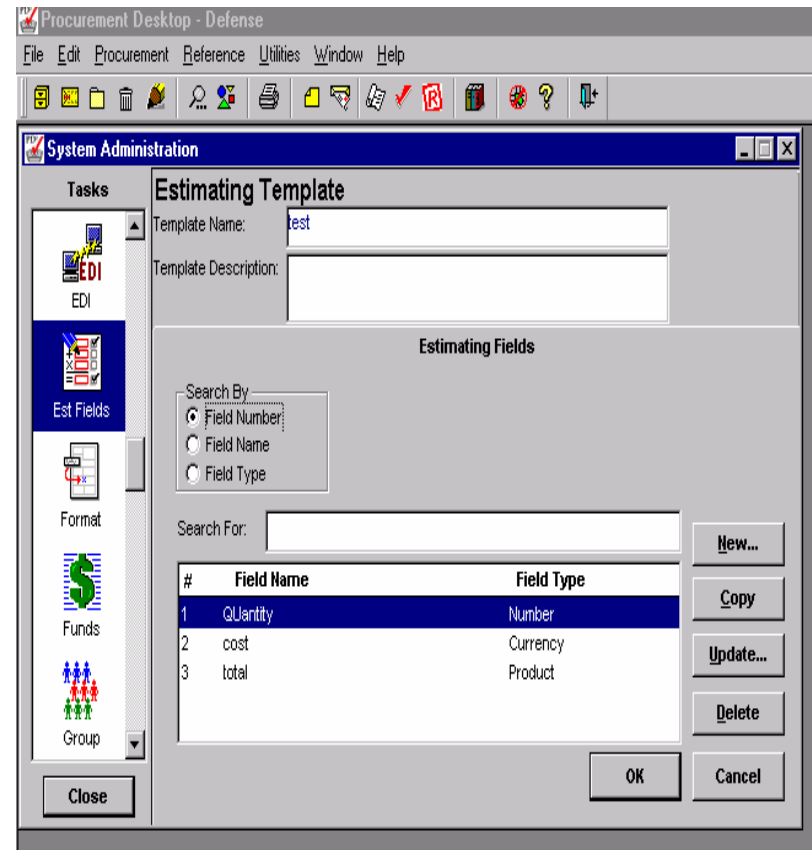
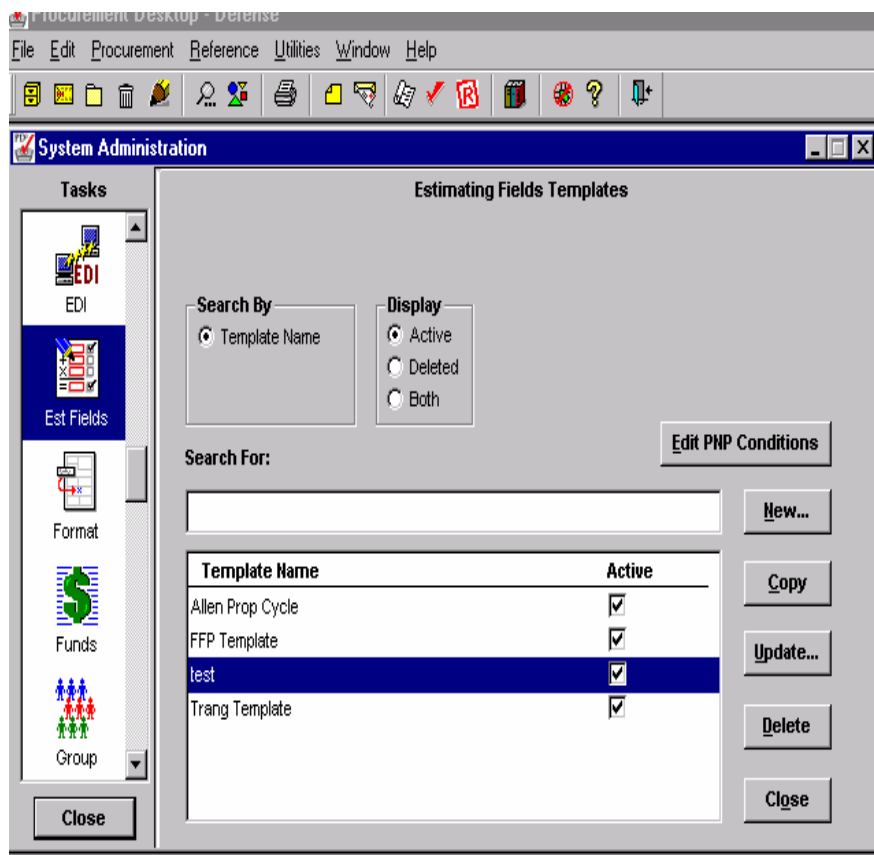
30. DATE

31. SIGNATURE OF AUTHORIZED GOVT. REP.

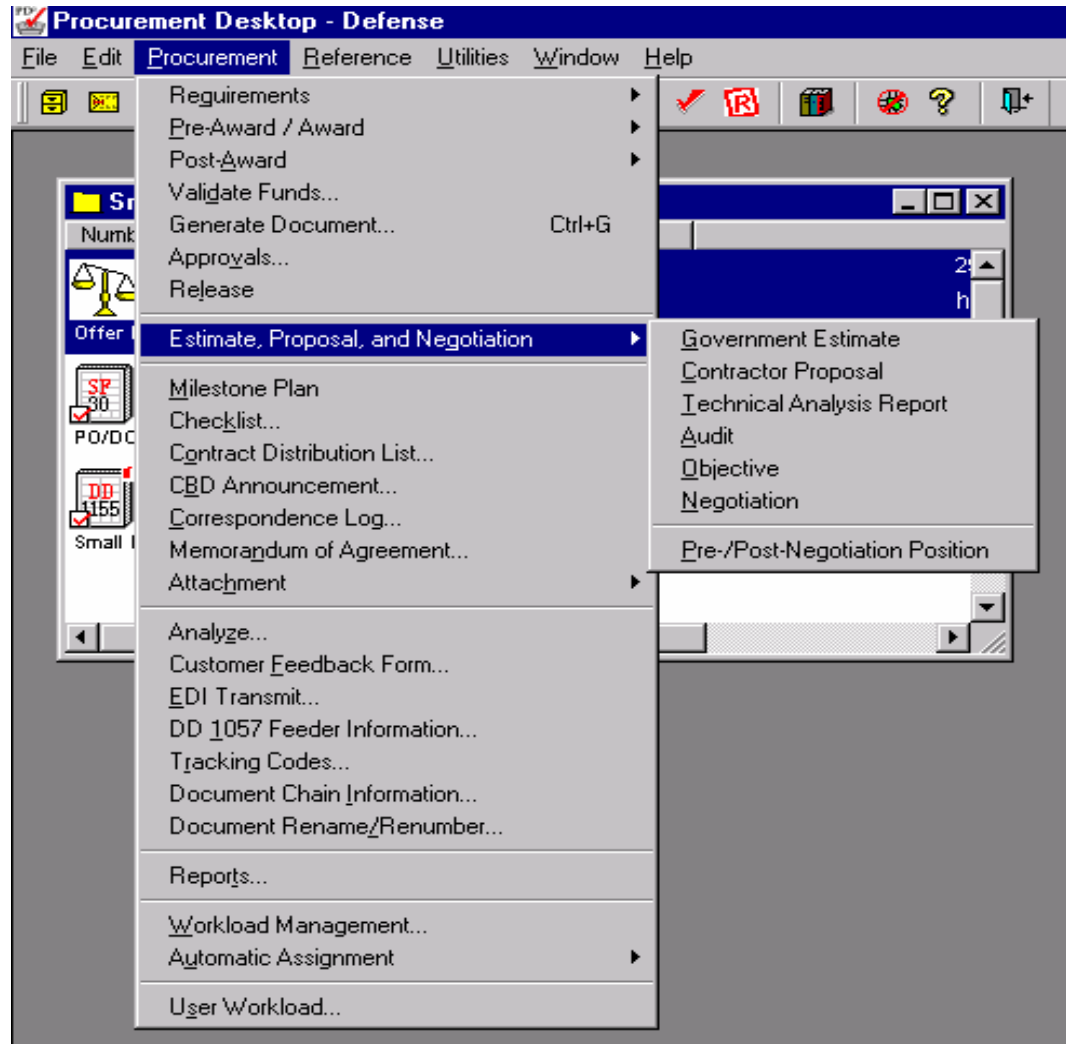
DEVELOPED PRIMARILY FOR POST-AWARD/MODIFICATION ACTIONS IN SUPPORT OF BRIDGE FOR THE NAVY.

- Templates can be customized for pricing data.
- Can create appropriate documents, i.e. Government Estimate, Contractor Proposal, Audit, Technical Analysis Report, Government Objective and Government Negotiation.
- Can create Pre/Post Negotiation Position Summary

SA Task for Templates in v4.2



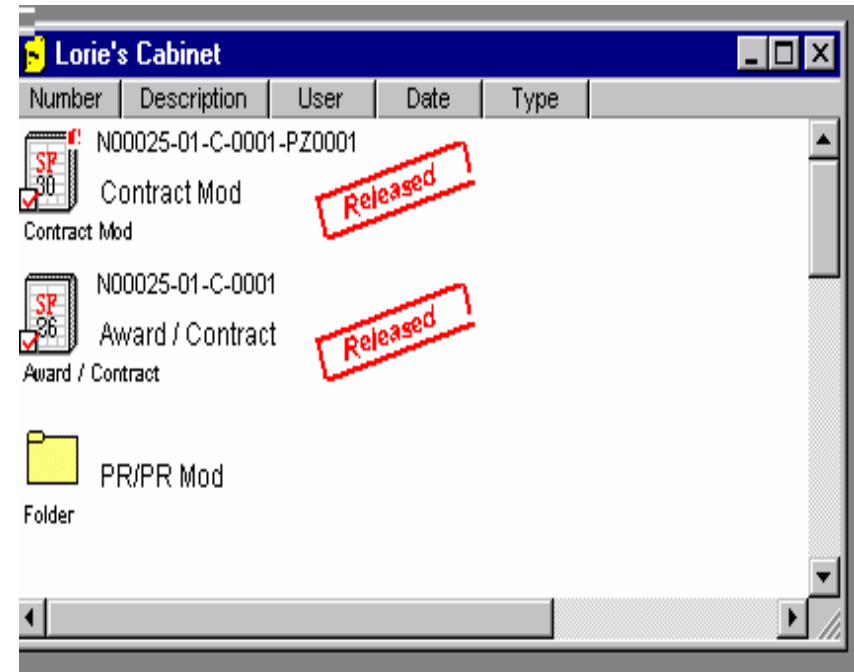
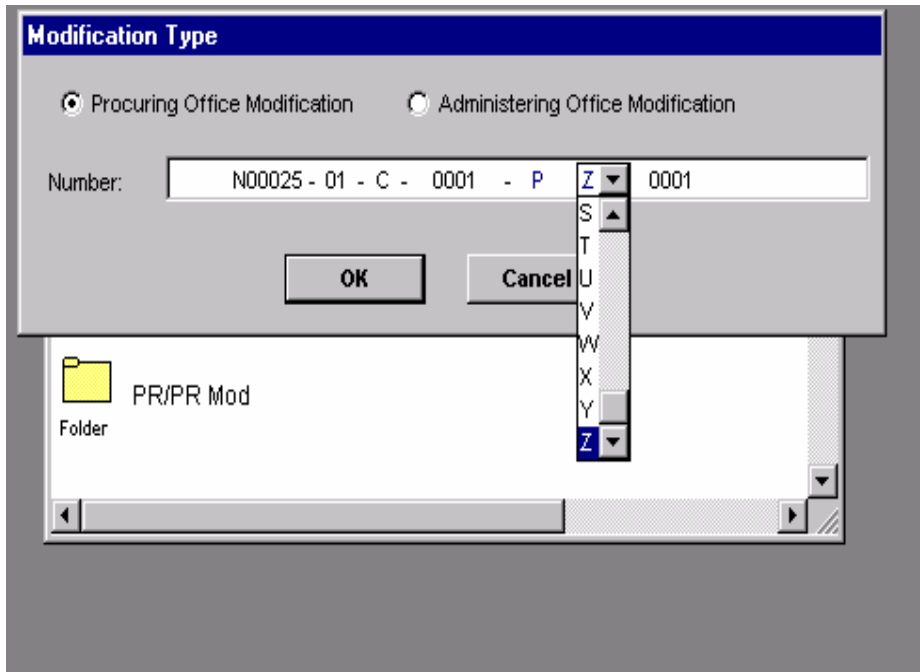
Negotiation Documentation in v4.2



- Can change an attachment date in **Section J**
- Modification allows 2nd digit alpha (i.e. PK0001, AZ0001- see next slide)
- Updates the fields of remaining unreleased concurrent mods once a concurrent mod is released.

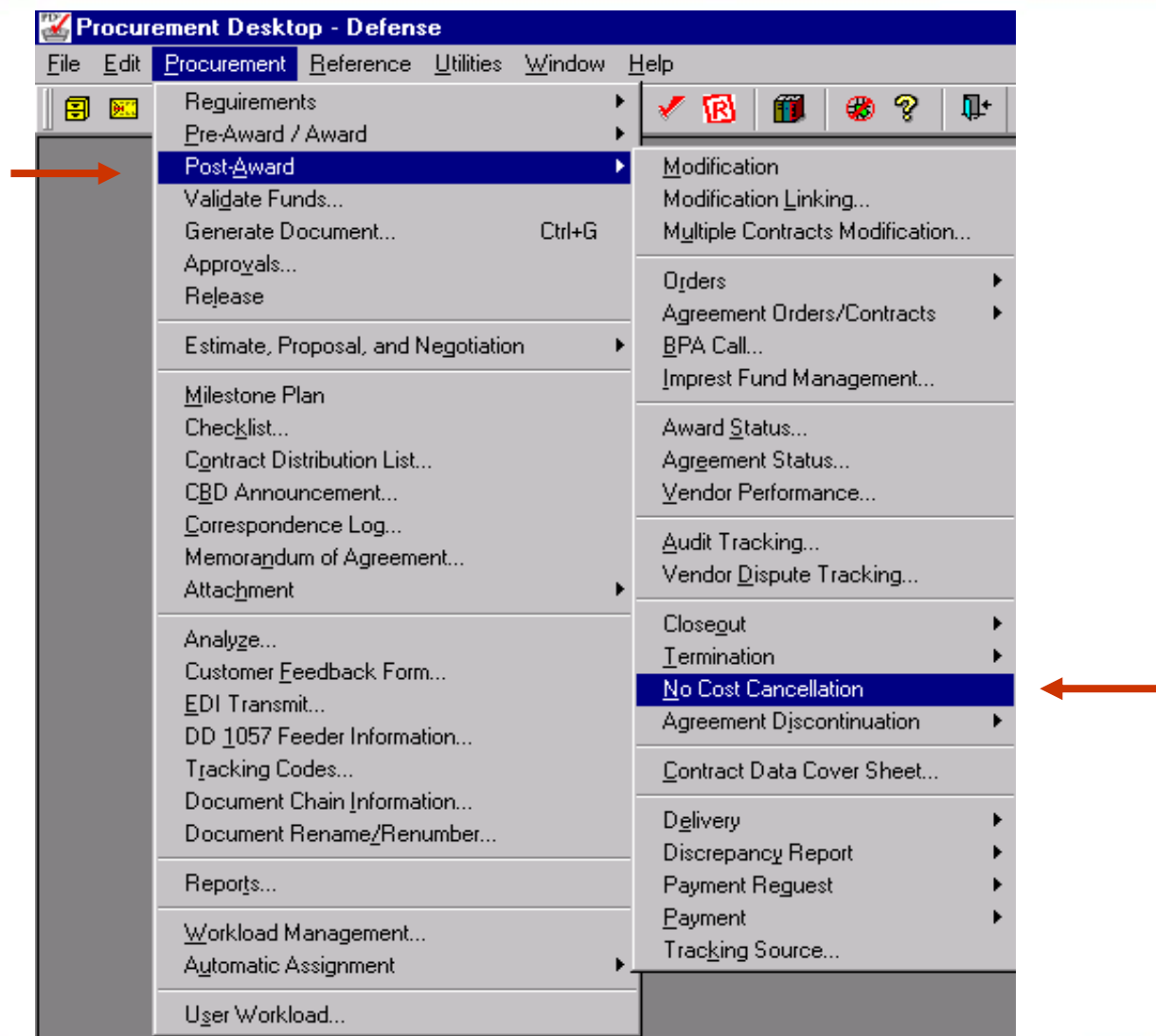
Mods with 2-Digit Alpha Number

PZ Mod to Definitize a Letter Contract

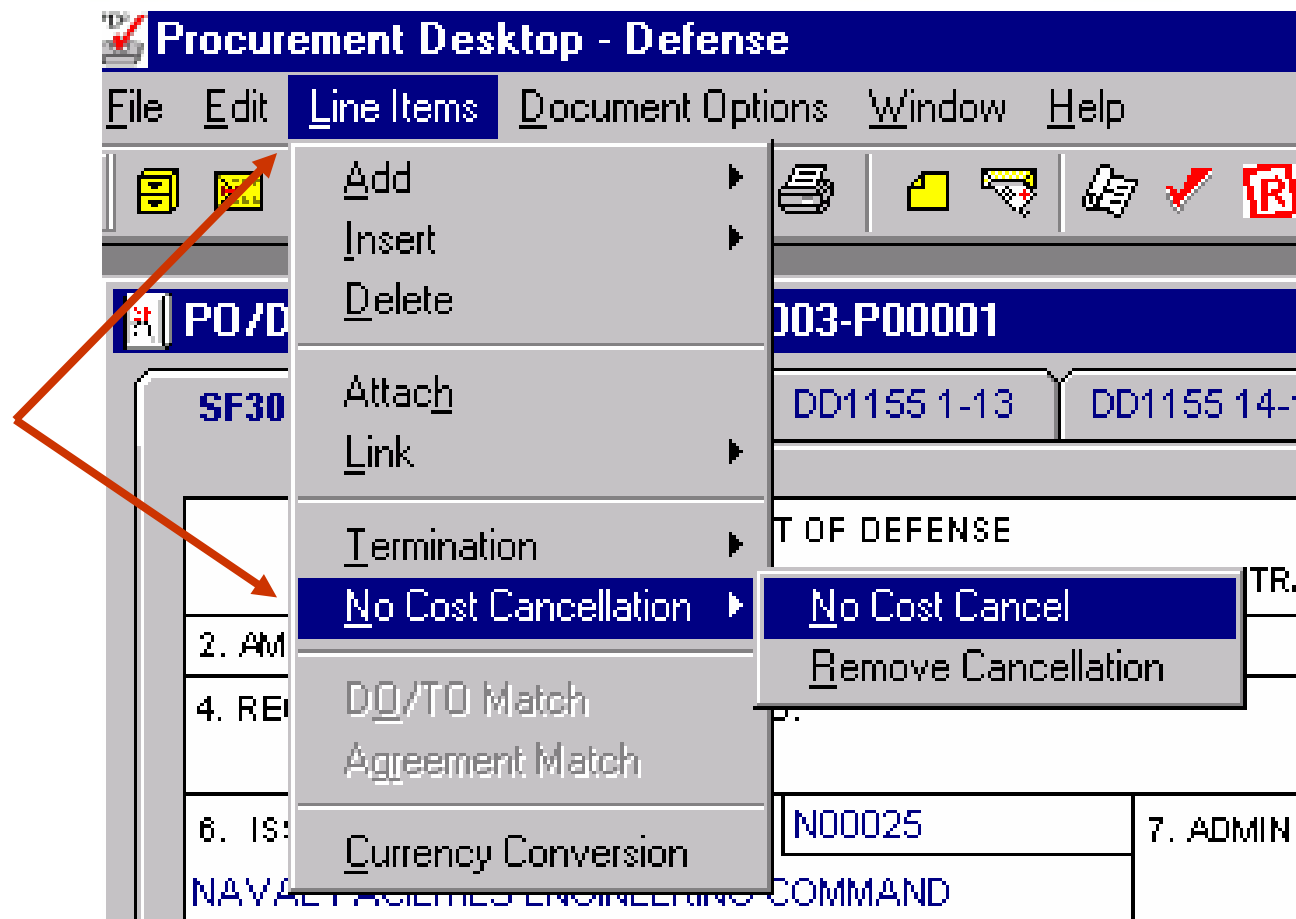


The **Modification Type** window automatically comes up prior to release of any mod. This is when you change the "O" to a "Z."

- Termination is no longer the only option
- Process is the same as termination; For Contract cancellation: Highlight the contract, click on **Procurement>Post Award>No Cost Cancellation**.
- **No Cost Cancellation** allows you to fully or partially cancel offers/awards (see slide for Line Item Cancellations)
- Funds are returned to the available balance!



No Cost Cancellation by Line Item



Note: Highlight Line Item in Document

Associating and Linking Line Items (Bridge Related Functionality)

- Associates a PR line item that changes an existing contract CLIN with that CLIN
- Links Modification CLINS to PR CLINS
- Displays all associations established between the PR CLINs and Contract CLINs

PR Mod - LH-01-0001 [Read Only]

Main Form | Line Items | **Contracts** | Add'l Data | Clauses

Contract Data	Description PR Mod	Purchase Request Number LH-01-0001	
	Requisition Date 10-Apr-2001	DPAS Priority Rating pOC9e	Priority 12

Suggested Type of Contract
Firm Fixed Price

Suggested Contracting Officer's Representatives
No Cors Defined

See Line Item Detail for Proposed Individual CLIN Contract Types

Suggested Contract Information
Contract/Agreement Number:

☐ Delivery Order
☐ Modification
☐ Association

Select **Edit Associations**

Suggested Preference Program
No Preference / Not Listed

KO Notes

PD²

? Will this PR be used to establish associations?

Yes **No** **Cancel**

PR Mod - LH-01-0001 [Read Only]

Main Form | Line Items | Contracts | Add'l Data | Clauses

Attachment Selection

Search Criteria
N00025-01-P-0008%

Document Type
Released Contract (Conformed Copy)

Search By
☒ Document Number ☐ Month Issued
☐ Document Title ☐ Issuing Office

Search **Select** **Cancel**

N00025-01-P-0008-P00001 PO/DO Mod

Add

Suggested Contract Information
Contract/Agreement Number:

☐ Delivery Order
☐ Modification
☐ Association

Edit Associations

Suggested Preference Program
No Preference / Not Listed

Click on the **[Select]** button and when this window comes up, click on **[Yes]** if you want to establish an association; if not, then click on **[No]**. Either response will bring up the **Attachment Selection** window.

Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

PR Mod - LH-01-0001 [Read Only]

Main Form Line Items **Contracts** Add'l Data Clauses

Contract Data	Description PR Mod	Purchase Request Number LH-01-0001	
	Requisition Date 10-Apr-2001	DPAS Priority Rating POC9e	Priority 12

Suggested Type of Contract
Firm Fixed Price

Suggested Contracting Officer's Representatives
No Cors Defined

See Line Item Detail for Proposed Individual CLIN Contract Types

Associated Contract Information
Contract/Agreement Number:
N00025-01-P-0008-P00001

☐ Delivery Order
☐ Modification
☒ Association

Edit Associations

Suggested Preference Program
No Preference / Not Listed

KO Notes

Associated Contract Information is now reflected as well as the Contract Number. Double click on **[Edit Associations]**. This can also be edited when in “read only”-mode.

Associate Line Items

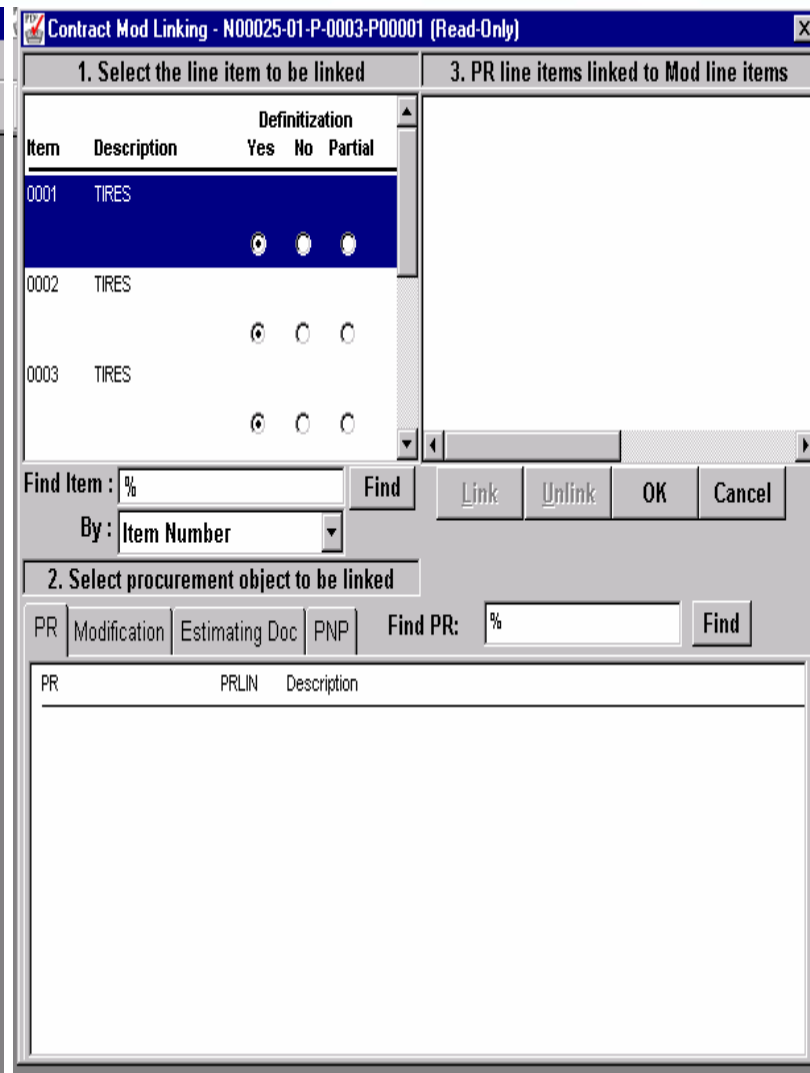
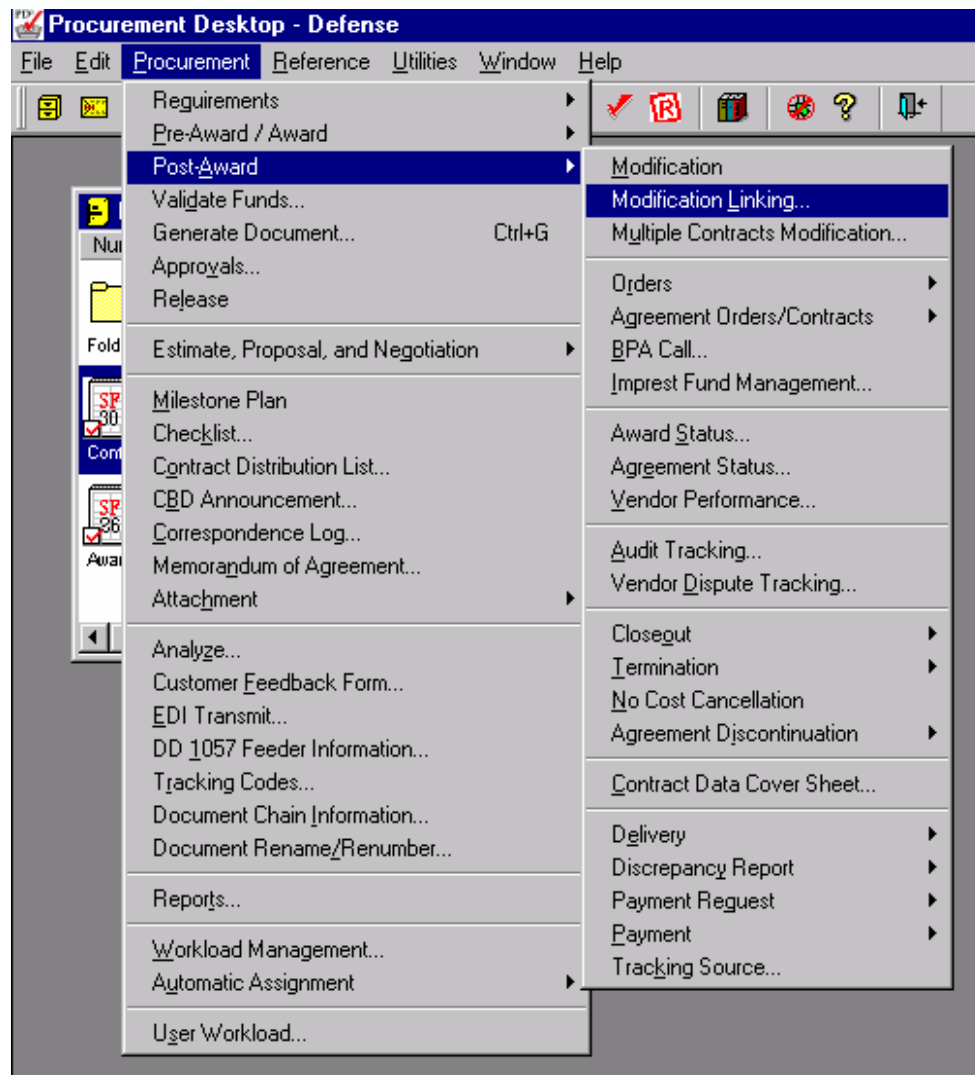
1. Select the PR line item to be associated		3. Contract line items associated to PR line items	
Line Item	Description	Line Item	Description
0001	widgits	0001	widgits
0002	widgits		

Reset Associate Remove OK Cancel

Selected Contract	2. Select the Contract line item to be associated
Contract Used for Associations	Line Item
N00025-01-P-0008-P00001	0002
	Description
	widgits

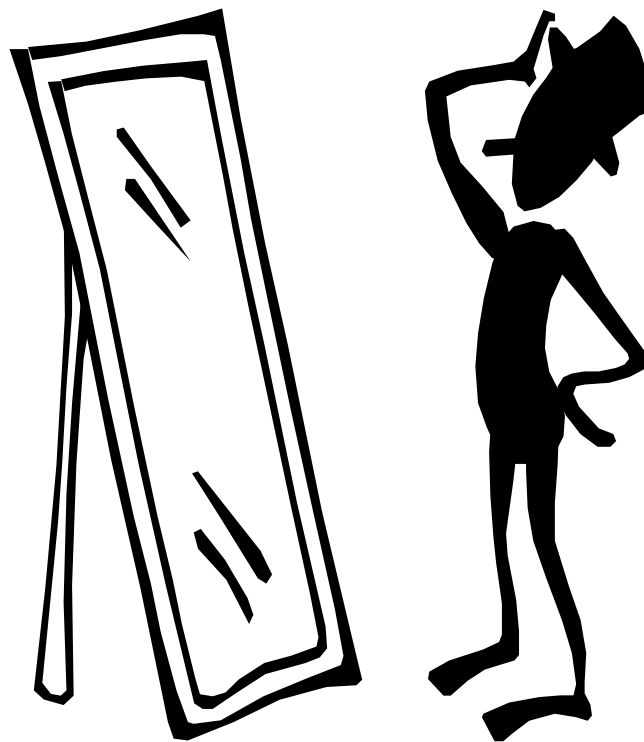
Highlight **0001** in **Block 1** and 0001 in **Block 2**, double click on the **[Associate]** button and **0001** shows up in **Block 3**.

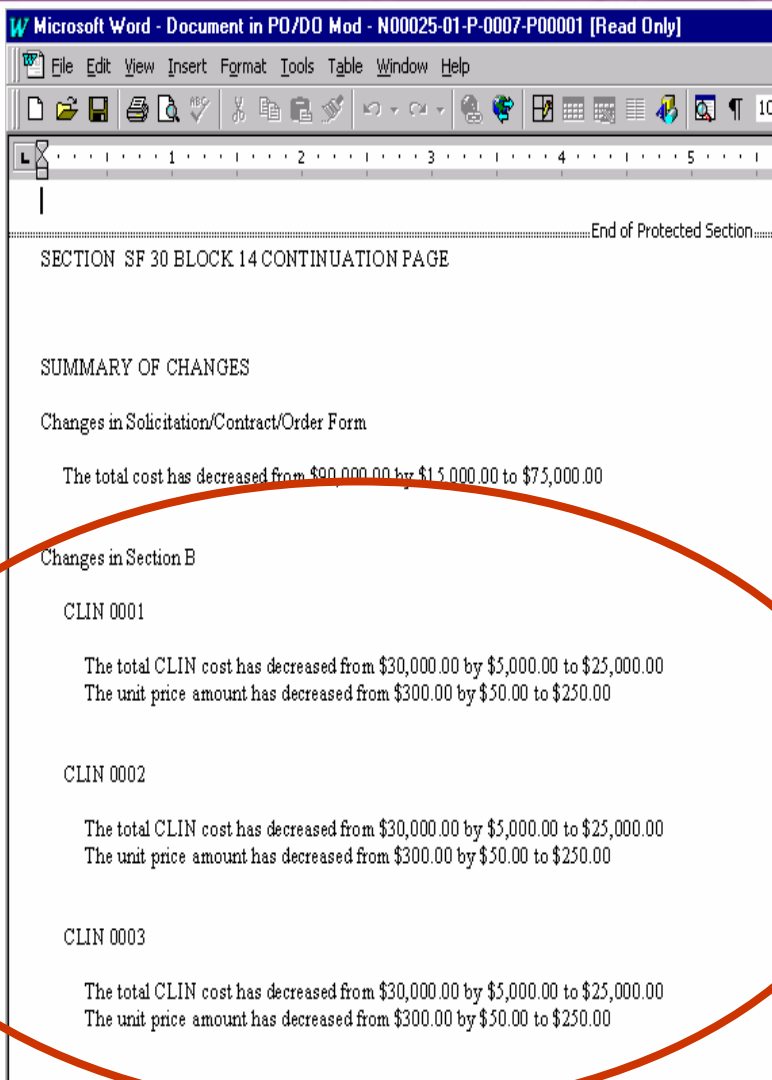
Modification Linking in v4.2

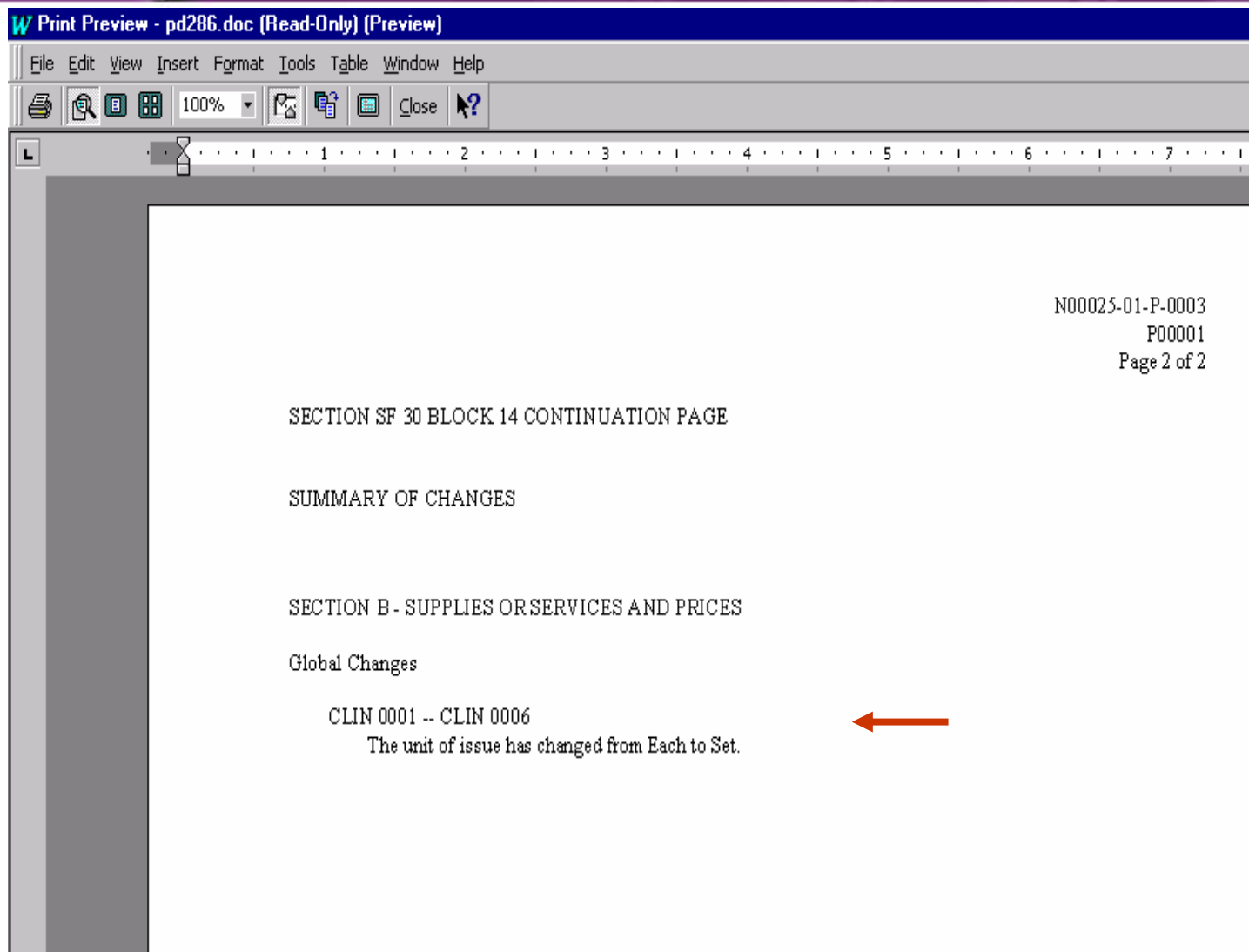


Summary of Changes in v4.2

- Recognizes Global Changes for an entire range of CLINs instead of itemizing each one.







- **Closeout** Task still identifies criteria
- New SA Task - **Automatic Closeout**
- SA selects by user/team/both and can select all for each group on a “as required” basis. You can also select active and deleted users; then click on auto close. This is not a permanent selection; this must be accomplished each time. No more alerts!
- Allows manual closeout (can attach DD 1594, DD 1597) for BPA Calls only.

Closeout Task in v4.1x and v4.2

Number Description User Date Type

NEW REQN-0001 28 MAR 01 13
PR Mod higgins
PR Mod

N00025-01-P-0001 22 MAR 01 15
Small Purchase Award higgins
Small Purchase Award

System Administration

Tasks

Class

Clause Rule

Clauses

Closeout

Contract Type

Automatic Closeout Criteria

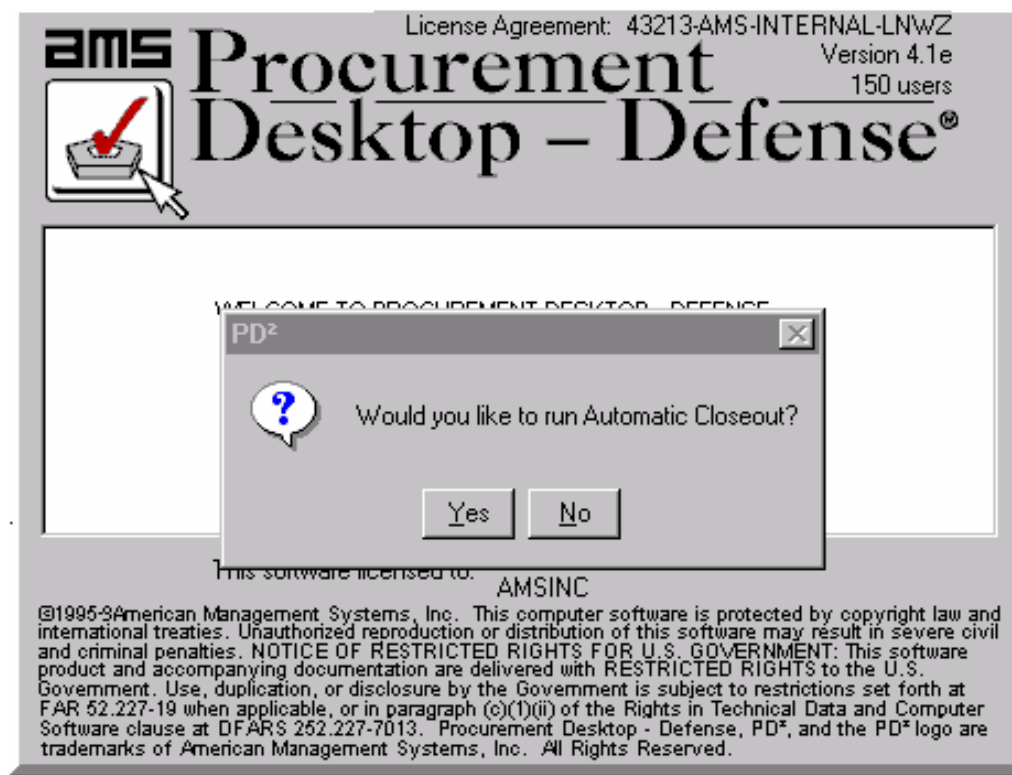
Contract Retention Data

Contract Type	Action/ Days After	Min. Value/ Max. Value
<input checked="" type="checkbox"/> Fixed Price Supply (Contracts & Delivery Order)	CLIN Delivery Date	\$2,500.01
System-defined criteria, cannot be deleted		10 days \$100,000.00
<input checked="" type="checkbox"/> Fixed Price Services (Contracts & Task Orders)	Final Payment Date	\$2,500.01
System-defined criteria, cannot be deleted		0 days \$100,000.00
<input checked="" type="checkbox"/> Fixed Price Supply (Contracts & DOs) (no open orders)	CLIN Delivery Date	\$100,000.01
System-defined criteria, cannot be deleted		10 days \$5,000,000.00
<input checked="" type="checkbox"/> Fixed Price Services (Contracts & TOs) (no open orders)	Final Payment Date	\$100,000.01
System-defined criteria, cannot be deleted		0 days \$5,000,000.00
<input checked="" type="checkbox"/> Firm Fixed Price	Release of Order	\$2,500.00
		0 days \$50,000.00

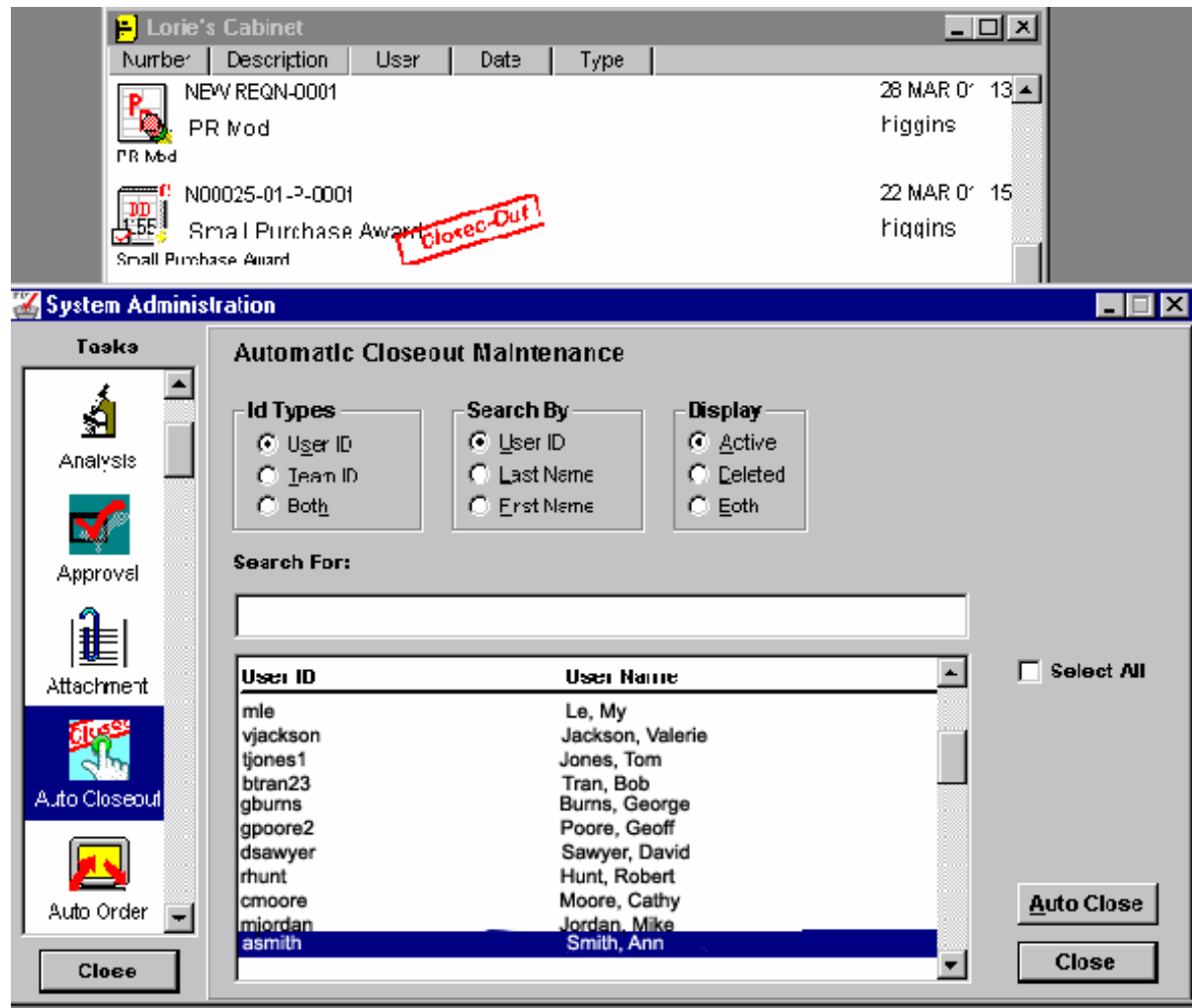
Office Type
☒ PCO ☐ ACO

Add Delete OK Close

Close



Allows user to close out



No alert - User cannot use Automatic Closeout

Manual Closeout for BPA Calls in v4.2

Small Purchase

Number	Description	User	Date	Type
1597	Contract Closeout Checklist			h
1594	Contract Completion Statement			h
1155	BPA Call			h
1155	Blanket Purchase Master Agreement			h

Released

Released

Contract Closeout Checklist - N00025-01-A-0001-0001

Items 1-5e	Items 5f-5l	Items 5m-5s	Items 5t-9
CONTRACT CLOSEOUT CHECK-LIST		1. CONTRACT NUMBER N00025-01-A-0001-0001	
3. NAME OF CONTRACTOR AMERICAN MANAGEMENT SYSTEMS, INC.		2. CONTRACT MODIFICATION NUMBERS (if applicable) No released modifications	
4. DATE OF PHYSICAL COMPLETION (YYMMDD) <input type="text"/>		6. MILESTONES / CALENDAR MONTHS AFTER PHYSICAL COMPLETION (FAR 4.804-1)	7. FORECAST COMPLETION DATE (YYMMDD)
5. ACTION ITEMS		CATEGORY 2	8. DATE ACTION COMPLETED (YYMMDD) (N/A if not applicable)
<input checked="" type="checkbox"/> a. DISPOSITION OF CLASSIFIED MATERIAL COMPLETED		<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> b. FINAL PATENT REPORT SUBMITTED (Inventions Disclosures) DD 882		<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> c. FINAL ROYALTY REPORT SUBMITTED		<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> d. FINAL PATENT REPORT CLEARED (Inventions Disclosures)		<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> e. FINAL ROYALTY REPORT CLEARED		<input type="text"/>	<input type="text"/>

Small Purchase

Number	Description	User	Date	Type
1594	Contract Completion Statement			h

Contract Completion Statement - N00025-01-A-0001-0001

Items 1-7	Items 8-9	Item 10
CONTRACT COMPLETION STATEMENT		
1. FROM: (Contract Administration Office) NAVAL FACILITIES ENGINEERING COMMAND		2a. PII NUMBER N00025-01-A-0001-0001
		2b. LAST MODIFICATION NUMBER
		2c. CALL/ORDER NUMBER
3. TO: (Name and Address of Purchasing Office and Office Symbol of the PCO, if known) NAVAL FACILITIES ENGINEERING COMMAND		4. CONTRACTOR IDENTITY CODE 22332 AMERICAN MANAGEMENT SYSTEMS, INC.
		5. EXCESS FUNDS YES <input type="checkbox"/> NO <input checked="" type="checkbox"/> \$0.00 IN PROCESS
6a. IF FINAL PAYMENT HAS BEEN MADE, COMPLETE ITEMS 6b., AND 6c.	6b. VOUCHER NUMBER <input type="text"/>	6c. DATE <input type="text"/>
7a. IF FINAL APPROVED INVOICE FORWARDED TO D.O. OF ANOTHER ACTIVITY AND STATUS OF PAYMENT IS UNKNOWN, COMPLETE ITEMS 7b. and 7c.	7b. INVOICE NUMBER <input type="text"/>	7c. DATE FORWARDED <input type="text"/>

Visit the **SPS Knowledge Base** for additional information about v4.2 at <http://kb.ams.com>

- PD² v4.2 Functionality Chat Transcript
- PD² v4.2 PowerPoint Presentation
- PD² v4.2 Fact Sheet



- Keep an eye out for our v4.2 Info-Mail which will inform you of any new v4.2 information available on the SPS Knowledge Base
 - FAQs
 - Release Notes
 - Road Map
 - Technical Architecture



